



**PHLCVB**  
Philadelphia Convention  
& Visitors Bureau

# WELCOME

GLOBAL TOURISM UPDATE

**Come for  
Philadelphia.**  
*Stay for Philly.*





# SVETLANA YAZOVSKIKH

Vice President of Global Tourism





**CHRIS RIZZO**  
**VP, Business Operations**  
**The Franklin Institute**





# SVETLANA YAZOVSKIKH

Vice President of Global Tourism



# 2022 GLOBAL TOURISM ACTIVITY RESULTS

## TRAVEL TRADE

Tradeshows

17

Client Engagements

1,370+

Total Trained

1,960



# MEDIA

Meetings

500+

Articles

464

ART

'Matisse in the 1930s' — opening at the Philadelphia Museum of Arts — contains about 140 works from public and private collections in the US and Europe.



**WHAT TECH DID IS ENCOURAGE PEOPLE TO RETURN TO MUSEUMS AFTER THE PANDEMIC. MANY PEOPLE — A LOT OF THEM YOUNG — BECAME INTERESTED IN ART DURING THE TWO-ODD "VIRTUAL YEARS" AND THEY NOW WANT TO SEE EXHIBITIONS IN THE FLESH**

**P**aris in the early decades of the 20th century had its share of frenetic socialising: one can only imagine the bobbing crowd at the different cafes — Henri Matisse, Amadeo Modigliani, Pablo Picasso, P. Savi Fitzgerald, Ernest Hemingway and countless others. There was a sense of freedom and dealers were looking to invest in young talent.

Matisse and Modigliani — two stars of the 20th-century art world — have their respective exhibitions in Philadelphia. Modigliani's works have been parked at the Barnes Foundation as part of the exhibition 'Modigliani Up Close' (October 30 to January 29, 2023) while those of Matisse (1869-1954) 'Matisse in the 1930s', October 9 to January 29, 2023) are up at the Philadelphia Museum of Art.

Matisse lived a long and abundant life as an artist (1869-1954) while Modigliani (1894-1920) met a premature death only after which his genius was recognised, becoming a central figure of Modern Art.

### Virtual world giving way to the real

'Modigliani Up Close' reveals how the Italian made his iconic paintings and sculptures. There are lessons for young people who want to take up art. When he arrived in Paris, he didn't have a lot of money. But he was very good when it came to the use of materials. Young artists who may not have a lot of money to spend on fancy

Philadelphia is home to some of the most important museums in the world, inspiring new generations of creative people. t2oS checks out

## THE ART CITY

art supplies can look at his work for pointers. "Looking" at his work involves seeing it in person and not just on a tech platform. It's interesting to see important exhibitions return and at professional scales. During the pandemic museums had to rethink how they were presenting art. Things were done



'Modigliani Up Close' is showing at Barnes Foundation in Philadelphia

through technology and it was something art curators hadn't even thought about in 2019. Everybody had to reinvent themselves and what technology proved is that art can be brought to a much wider audience. A lot of people, who never looked at the big museums earlier, suddenly had art at their fingertips. Of course, the experience can't be replicated. Even if you look at reproductions of Modigliani you won't get a sense of texture or depth or even the variation of colours. What tech did do

encourage people to return to museums. Many people — a lot of them young — became interested in art during the two-odd "virtual years" and they now want to see exhibitions in the flesh. Times change, not always the mindset. The Modigliani exhibition is also a reminder that mindsets have evolved slightly but not changed. The year 2023 was historically important because

MEDIA

Meetings

500+

Articles

464

THE  TIMES

Today's sections ▾

Past six days

Explore ▾

Times Radio

USA

## Welcome to Philadelphia — New York's fun (and more affordable) cousin

With downtown skyscrapers, excellent museums and new budget flights, this US city on the east coast is giving the Big Apple a run for its money



# MEDIA

Meetings

500+

Articles

464



## Philadelphie, la ville aux plus de 4 000 fresques murales

Depuis près de quarante ans, la ville de Philadelphie utilise l'art urbain pour apporter de la vie et transmettre des messages importants afin de soutenir ses communautés et enrichir son patrimoine.

DE JOHANNA BISSO  
PUBLICATION ET BLOG: KATLIE TUCKER



UNE FRESQUE REPRÉSENTE UN MURIL ARTISTE LOCAL, UN DES PLUS DE 4 000 ARTISTES QUI ONT CRÉÉ DES ŒUVRES DE PHILADELPHIE ET PARTICIPÉ À DES PROJETS D'ART URBAIN EN PARTENARIAT AVEC LA VILLE. PHOTOGRAPHIE DE JACQUES CHATELAIN

Une imposante forêt de commerces et de magasins a récemment vu le jour sur une portion isolée de Lancaster Avenue dans l'est de Philadelphie. Plus vous arrivez, des papillons multicolores se dévoilent et une énergie ébulliente se propage. Ce jardin a poussé en l'espace d'une semaine, sur un mur de 21 mètres de long au sein d'une cour intérieure abandonnée et transformée en centre pour l'environnement.

Comme la quasi-totalité des 4 000 autres peintures murales réalisées par Mural Arts Philadelphia au cours des 35 dernières années, cette exubérante exposition de monde naturel, dévoilée pour le *Journée de la Terre* 2023, est le fruit de la collaboration entre une communauté et une artiste diplômée de l'académie à raconter son histoire.

### LES PLUS POPULAIRES



HISTOIRE  
Apprenez de l'histoire locale à travers les œuvres de son histoire.



PHILADELPHIE  
Une œuvre d'art qui raconte l'histoire de la ville.

**L**es rues de Philadelphie sont couvertes de fresques murales, une tradition qui a commencé il y a plus de 35 ans. Cette pratique a permis de transformer des murs nus en œuvres d'art et de créer un environnement plus accueillant et vivant. Les fresques murales sont aujourd'hui une partie intégrante du paysage urbain de la ville, et elles continuent d'être créées et entretenues par la communauté et les autorités locales.



# 2022 GLOBAL TOURISM ACTIVITY RESULTS

WeChat



SOCIAL

Audience growth

**+20,701**

Engagements

**225,656**

Accounts:

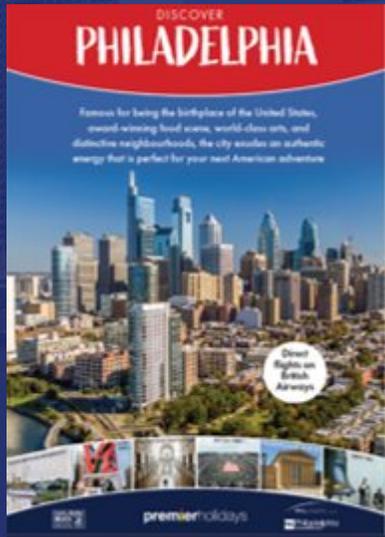
Facebook (DE+FR)

Weibo

WeChat

Toutiao

# 2022 GLOBAL TOURISM ACTIVITY RESULTS

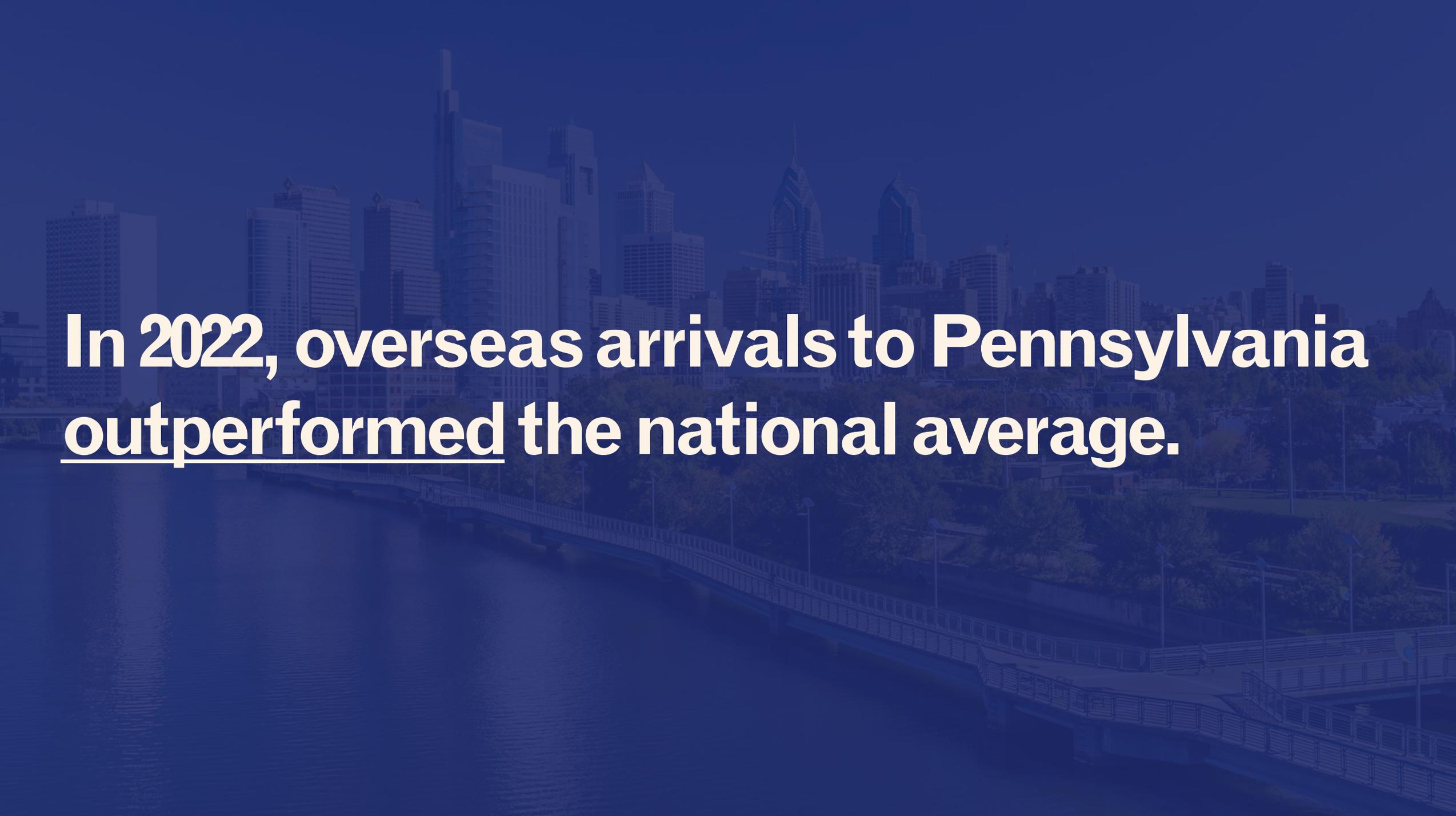


MARKETING

Features  
34

Reach  
771 mln

Engagements  
558,000+K

A blue-tinted photograph of the Philadelphia skyline, featuring prominent skyscrapers like the Comcast Center and the Liberty Bell Center. In the foreground, a waterfront promenade with a railing and trees runs along the water.

**In 2022, overseas arrivals to Pennsylvania outperformed the national average.**

# 2022 GLOBAL MARKETS EXCEEDING EXPECTATIONS



**85%**



**75%**



**+11%**



**+43%**

# Agenda

## Welcome

**Svetlana Yazovskikh**

Vice President of Global Tourism

## Overseas Visitation Forecast

**Patrick Smyton**

Senior Client Manager, Tourism Economics

## Global Tourism Update

### Europe

**Melissa McClure**

Global Tourism Sales Manager

### Asia Pacific + Emerging Markets

**Miriam Chovanec**

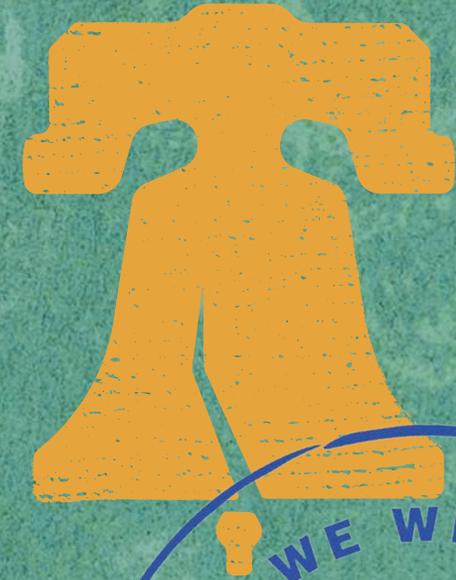
Senior Global Tourism Sales Manager

### Domestic Group Tour

**Annie Jirapatnakul**

Global Tourism Sales & Services Manager

## Questions & Answers





# PATRICK SMYTON

Senior Client Manager

Tourism Economics



# International Visitor Forecast

Philadelphia Region

Patrick Smyton  
Senior Client Manager  
Tourism Economics  
[psmyton@oxfordeconomics.com](mailto:psmyton@oxfordeconomics.com)



**1** National Travel Trends & Outlook

**2** Philadelphia Travel Trends & Outlook

# US travel spending beat 2019 numbers for the fourth consecutive month

## National Travel Indicators

December 2022 and YTD



Travel Spending  
(Tourism Economics)

↗ **+3.1%**

December vs. 2019

↘ **-0.6%**

YTD vs. 2019



Auto Trips  
(Arrivalist)

↘ **-0.8%**

December vs. 2019

YTD N/A



Air Passengers  
(TSA)

↘ **-6.7%**

December vs. 2019

↘ **-10.2%**

YTD vs. 2019



Overseas Arrivals  
(NTTO)

↘ **-28.8%**

December vs. 2019

↘ **-40.7%**

YTD vs. 2019



Hotel Demand  
(STR)

↗ **+1.1%**

December vs. 2019

↘ **-2.3%**

YTD vs. 2019



Short-term Rental Demand  
(AIRDNA)

↗ **+33.3%**

December vs. 2019

↗ **+27.0%**

YTD vs. 2019

# And there's plenty of momentum across various industry metrics

## National Travel Indicators

2022

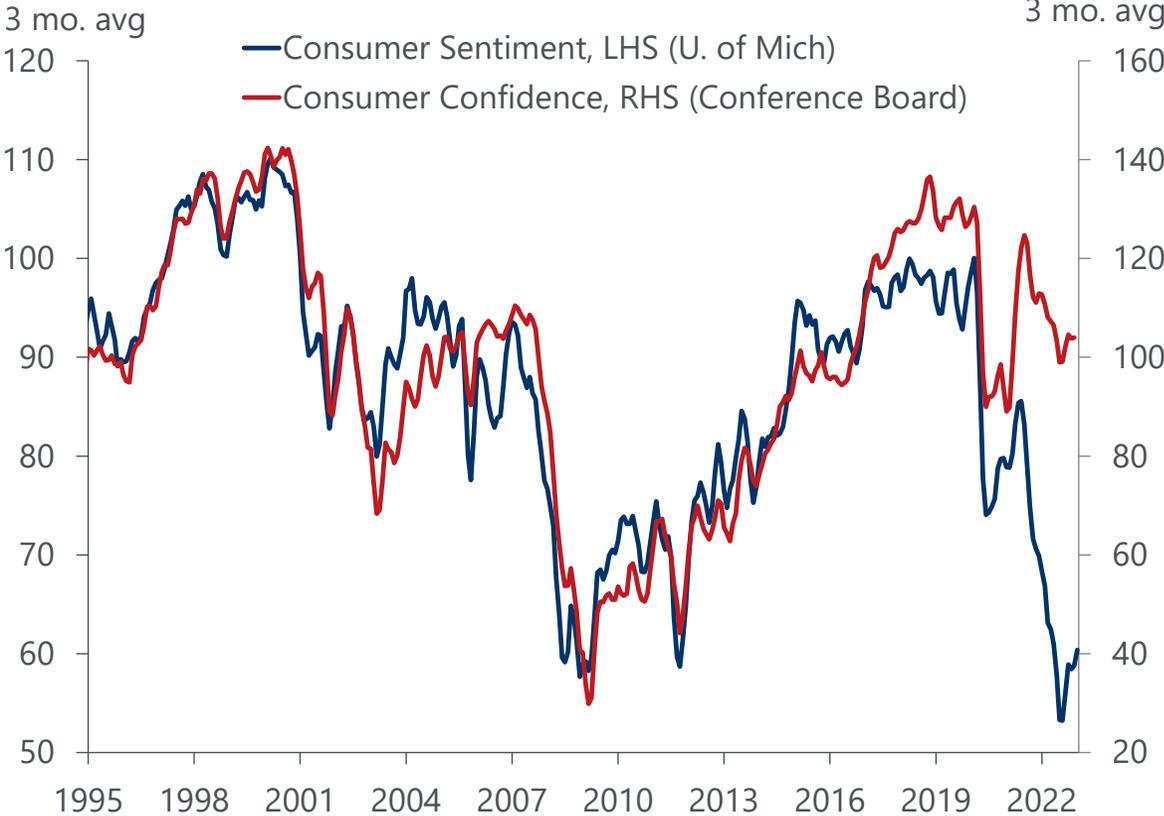
	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22
Travel Spending (Tourism Economics)	-12%	-6%	-5%	3%	0%	1%	0%	-3%	6%	3%	1%	3%
Auto Trips (Arrivalist)	-12%	-2%	-13%	6%	-2%	2%	-1%	-15%	6%	3%	-6%	-1%
Air Passengers (TSA)	-22%	-16%	-12%	-9%	-10%	-11%	-12%	-9%	-6%	-5%	-6%	-7%
<b>Overseas Arrivals (NTTO)</b>	<b>-65%</b>	<b>-60%</b>	<b>-52%</b>	<b>-43%</b>	<b>-43%</b>	<b>-41%</b>	<b>-35%</b>	<b>-35%</b>	<b>-34%</b>	<b>-30%</b>	<b>-33%</b>	<b>-29%</b>
Hotel Demand (STR)	-10%	-5%	-3%	0%	-2%	-2%	-3%	-4%	2%	0%	-1%	1%
Top 25 Group Hotel Demand* (STR)	-58%	-42%	-24%	-16%	-14%	-5%	-11%	-10%	-5%	-6%	-7%	-8%
Short-term Rental Demand (AIRDNA)	25%	27%	18%	28%	29%	26%	22%	19%	29%	40%	31%	33%
National Park Visits (National Park Service)	17%	5%	18%	8%	15%	-11%	-8%	-12%	-5%	2%	-4%	0%
Organic Web Sessions (Simpleview & Tempest)*	36%	43%	35%	33%	30%	26%	16%	15%	17%	24%	24%	19%

\*data from 300+ U.S. DMO/CVB destination websites



# Consumers feeling uneasy

## US: Consumer surveys

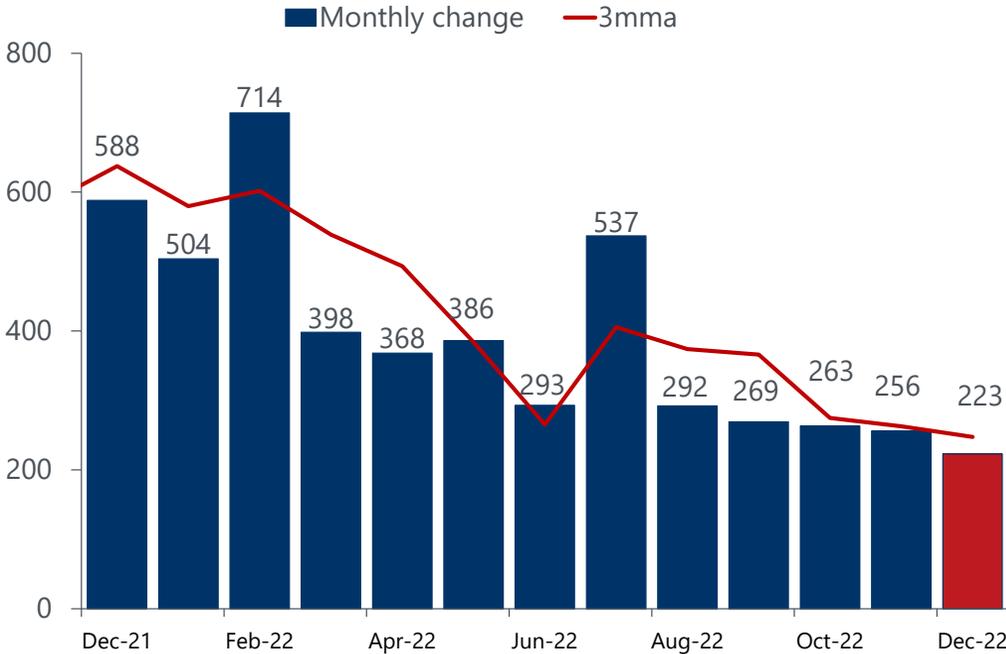


Source: Oxford Economics/Haver Analytics

# Job growth continues at a more tempered pace

US: Nonfarm payroll employment

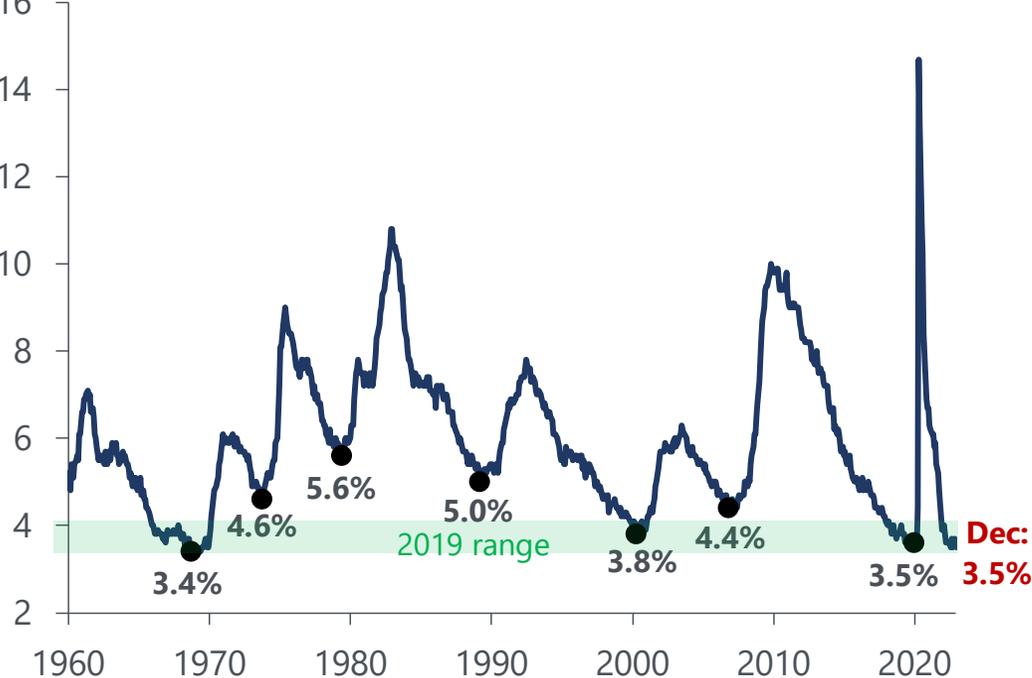
Thousand



Source: Oxford Economics/Haver Analytics

US: U-3 unemployment rate

%

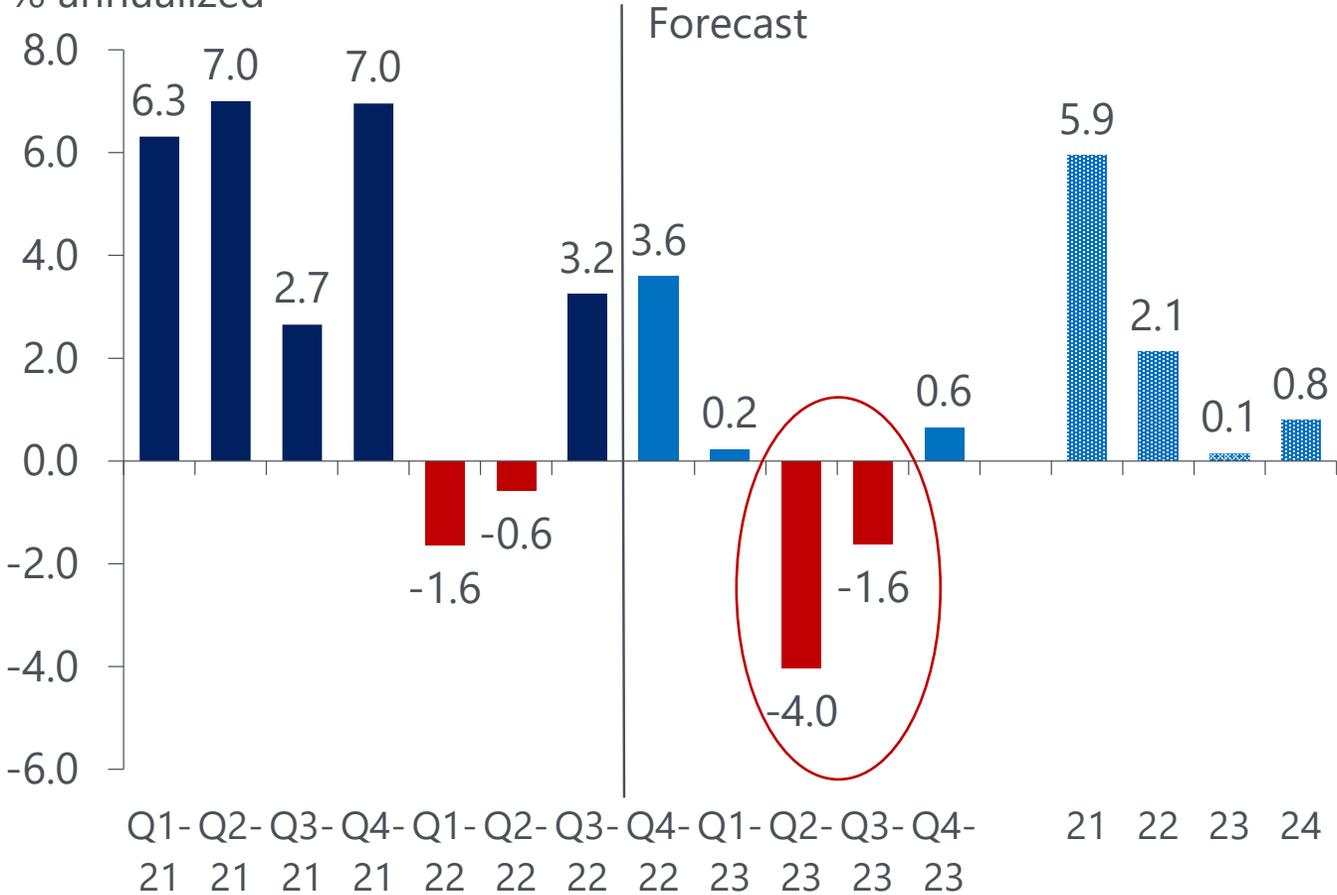


Source: Oxford Economics/Haver Analytics

# We are headed toward a recession in Q2

## US: GDP Forecast

% annualized



Source: Oxford Economics/Haver Analytics

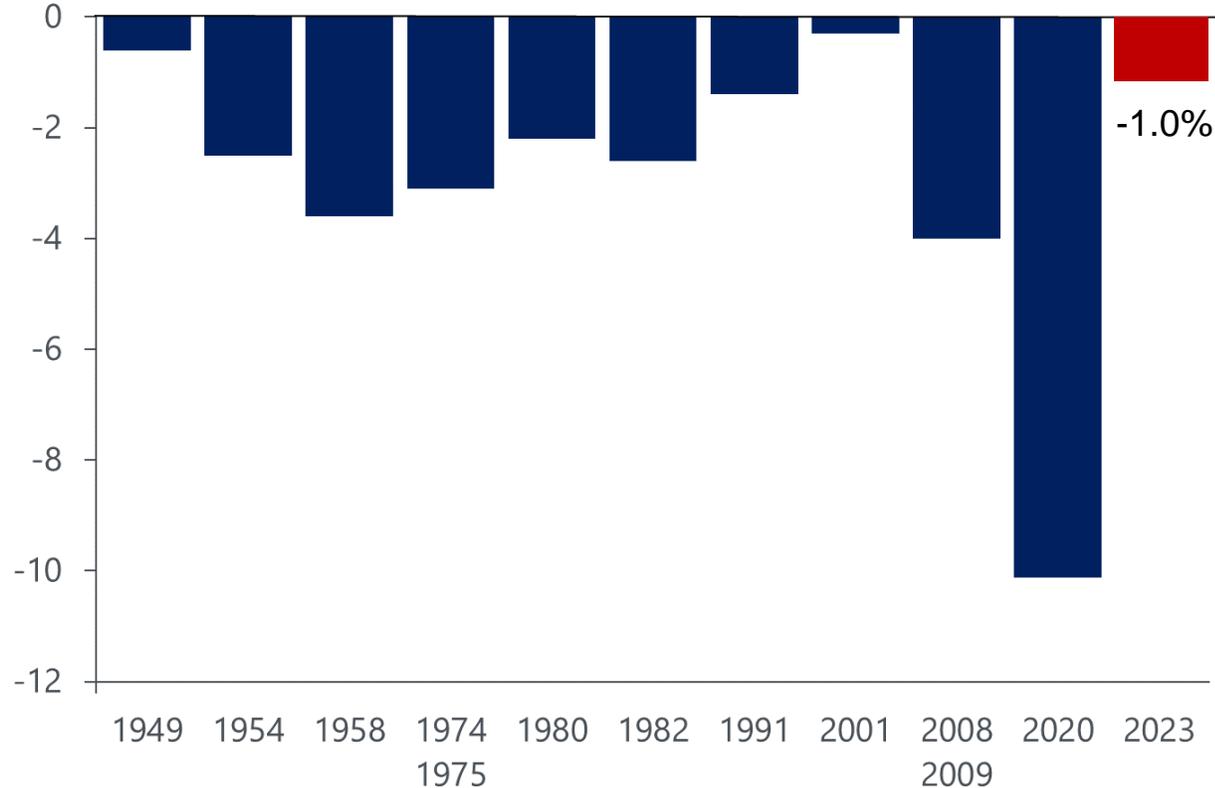
### Why?

- Persistently high inflation
  - Aggressive Fed monetary policy tightening
  - Negative spill-over effects from slower global activity
  - Weaker corporate earnings
- ...will weigh on consumers' and businesses' willingness to spend

# The recession will be mild by historical standards

## US: Peak-to-trough recessions since 1949

% change, peak to trough



Source : Oxford Economics/Haver Analytics

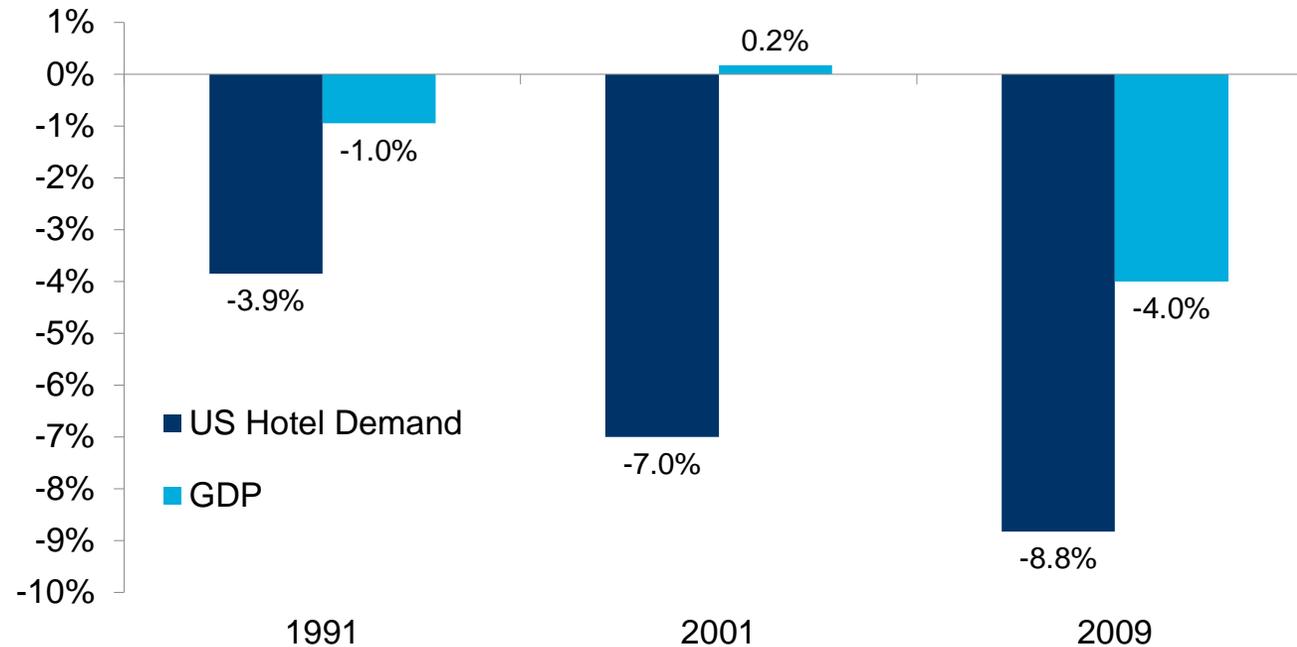
## Why?

- Household balance sheets are in great shape and debt service burdens are low.
- Nonfinancial corporate balances are strong
- State and local governments are flush with cash.

# What have the last three “normal” recessions looked like?

## Hotel demand during recessionary periods

Year-over-year %, quarterly peak-to-trough



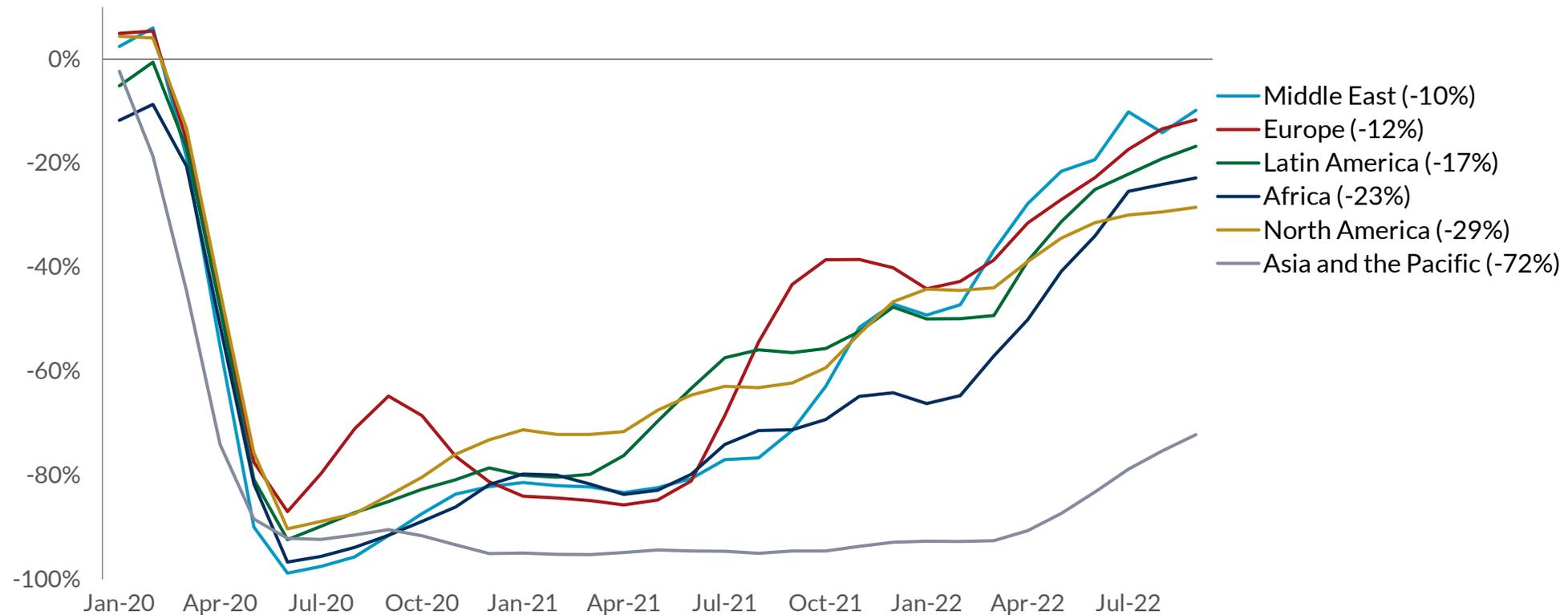
Quite a bit of variation is evident in the GDP-hotel room demand relationship

Source: STR, BEA

# Recovery is accelerating worldwide

## International Tourist Arrivals by World Region

% difference from same month in 2019, 3mma (figures in brackets are 3 months to Sept)

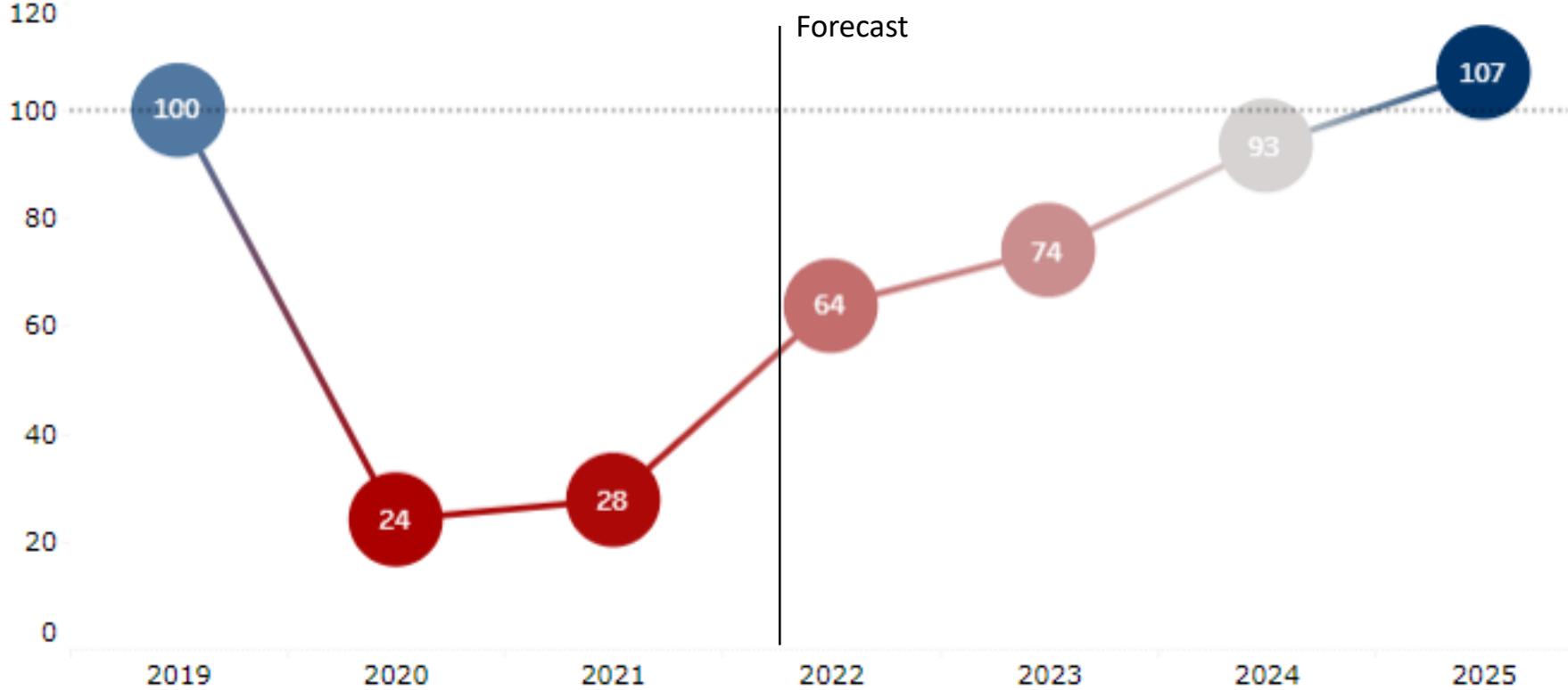


Source: UNWTO

# International travel to the US made notable progress in 2022

## Total International Visits to the US

Forecasted recovery, relative to 2019 (index, 2019 = 100)

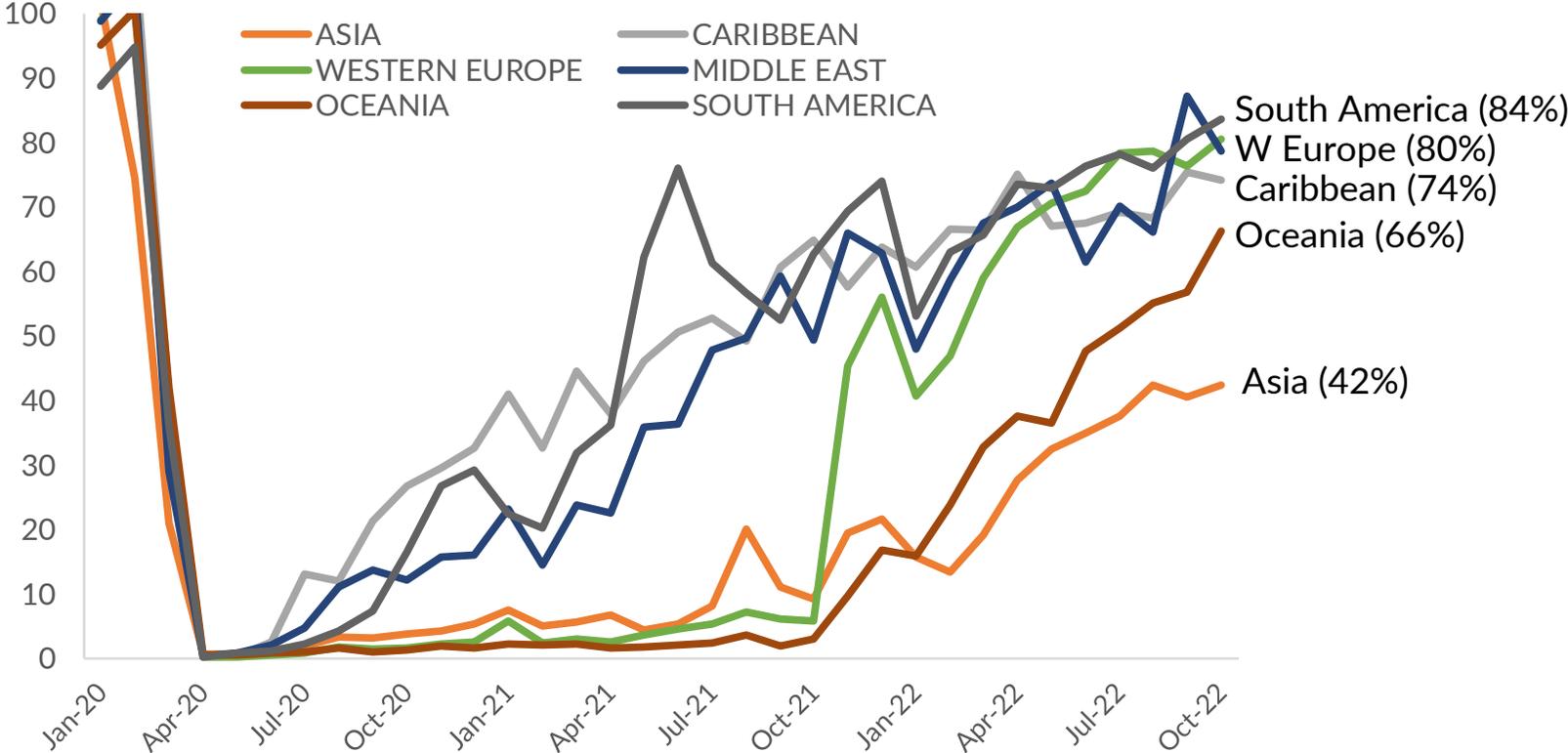


Source: Tourism Economics (forecast released December 2022)

# US is seeing recovery from all markets

## US Inbound Overseas Travel by Region

Same month in 2019 = 100

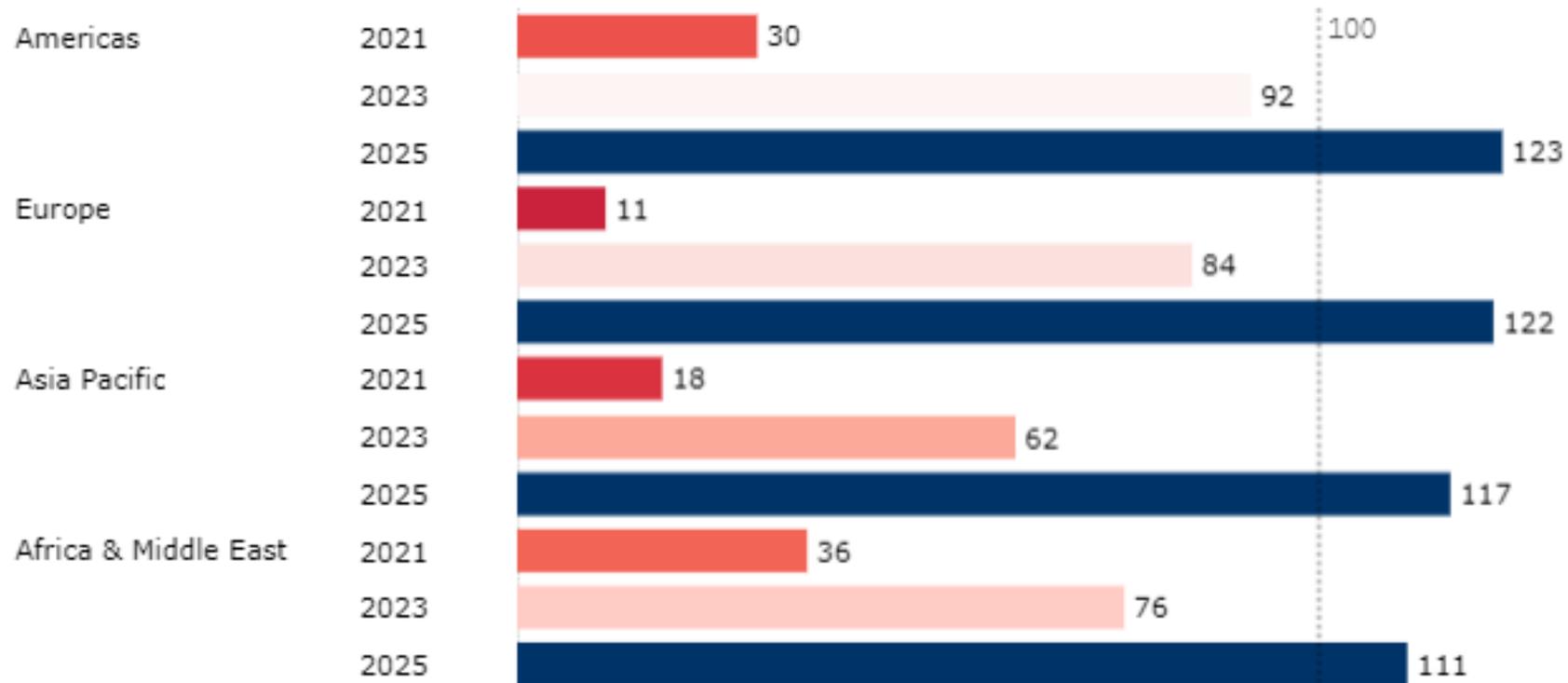


Source: I-94, NTTO

# Western Europe within touching distance of full recovery in 2023

## Total International Visits to the US

Forecasted recovery, relative to 2019 (index, 2019 = 100)



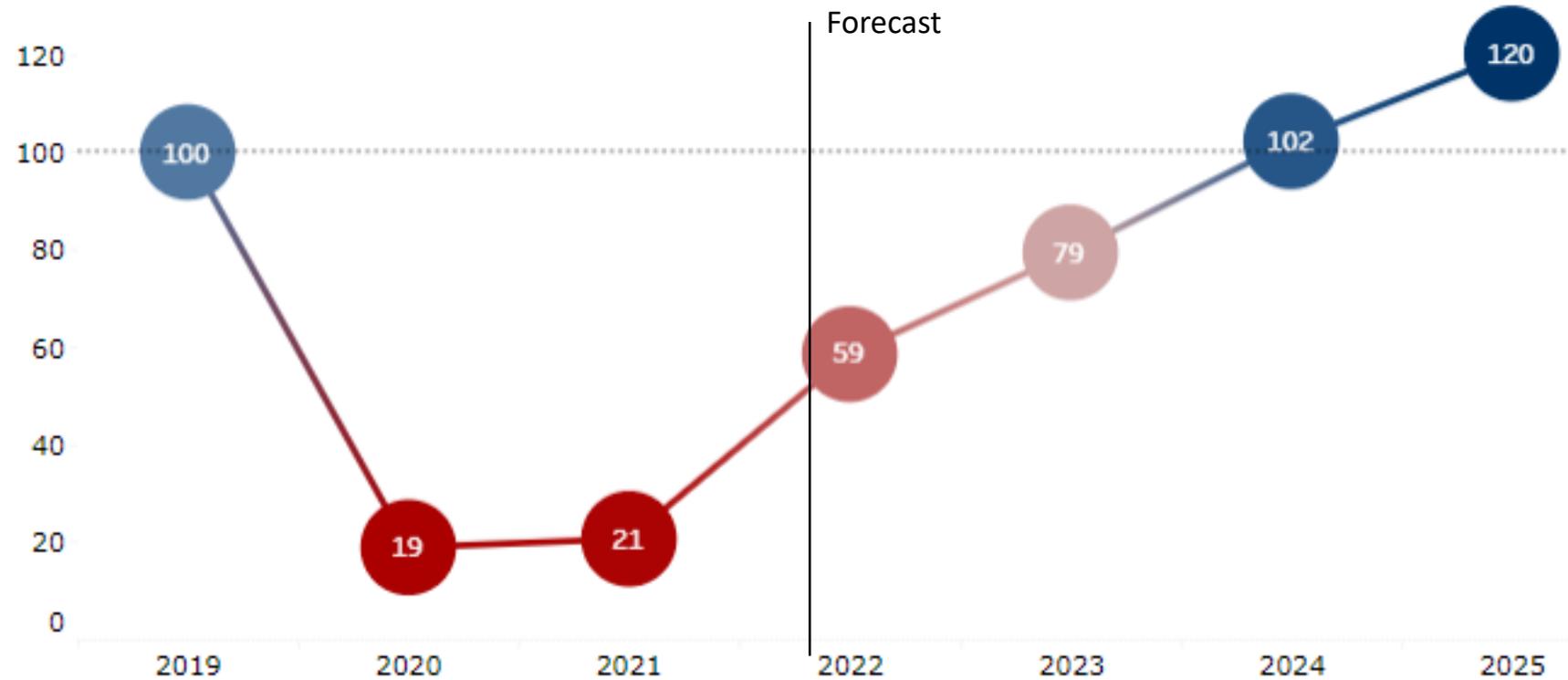
Note: Americas = Canada and Mexico

Source: Tourism Economics (forecast released December 2022)

# Spending is recovering at a slower pace than visits

## Total International Spending in the US

Forecasted recovery, relative to 2019 (index, 2019 = 100)

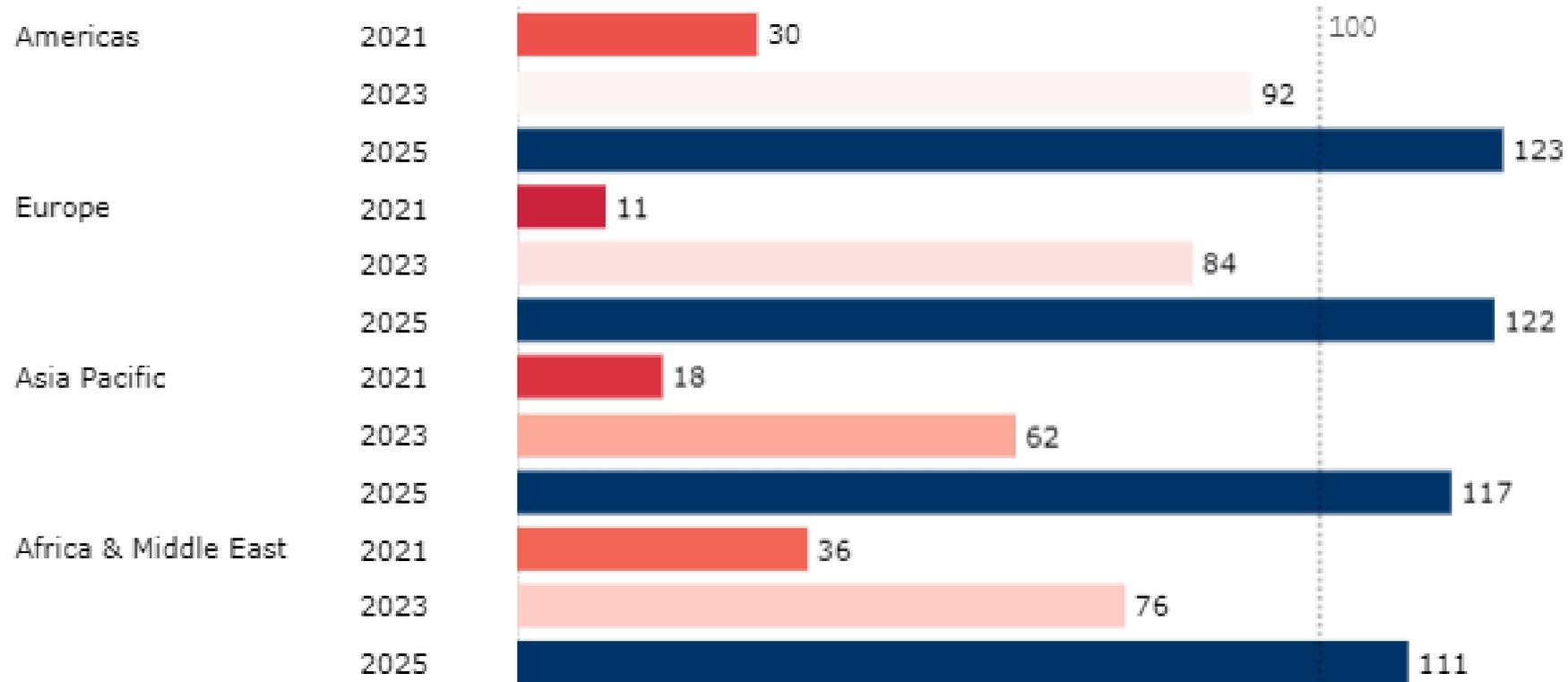


Source: Tourism Economics (forecast released December 2022)

# Western Europe driving recovery in spending

## Total International Spending in the US

Forecasted recovery, relative to 2019 (index, 2019 = 100)



Note: Americas = Canada and Mexico

Source: Tourism Economics (forecast released December 2022)

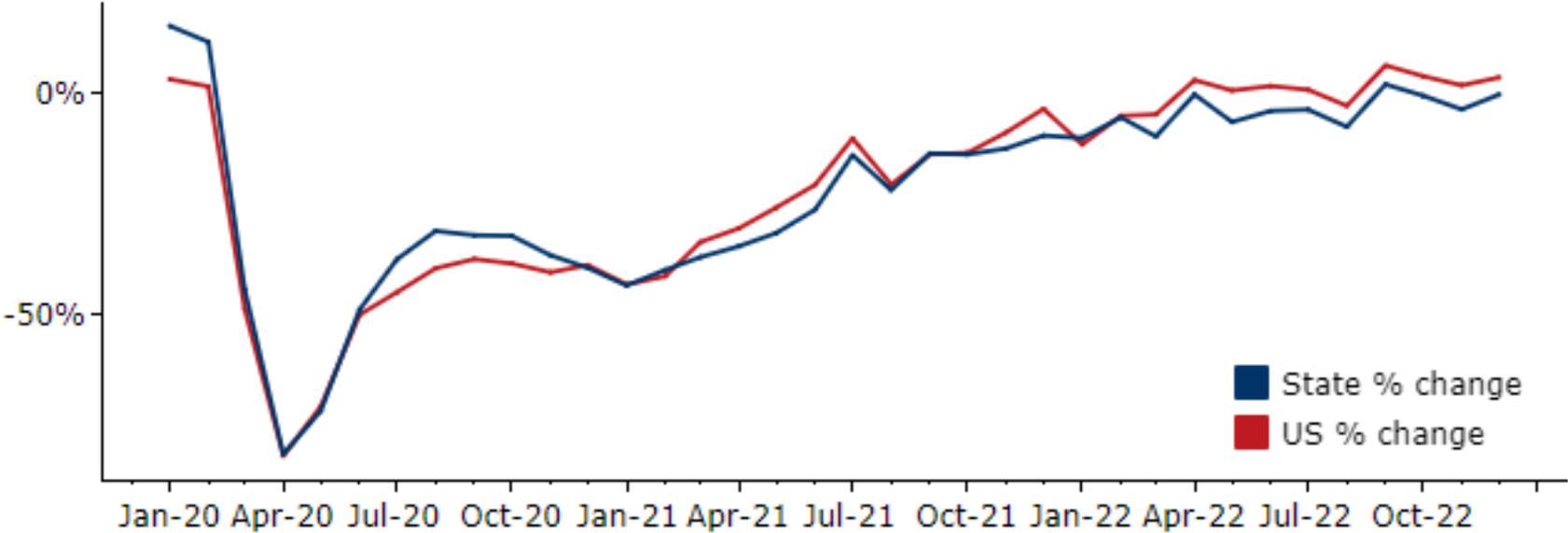
**1** National Travel Trends & Outlook

**2** Philadelphia Travel Trends & Outlook

# PA travel spending is trending closely to the national average

## Travel Spending (% change vs 2019)

Pennsylvania vs U.S. total

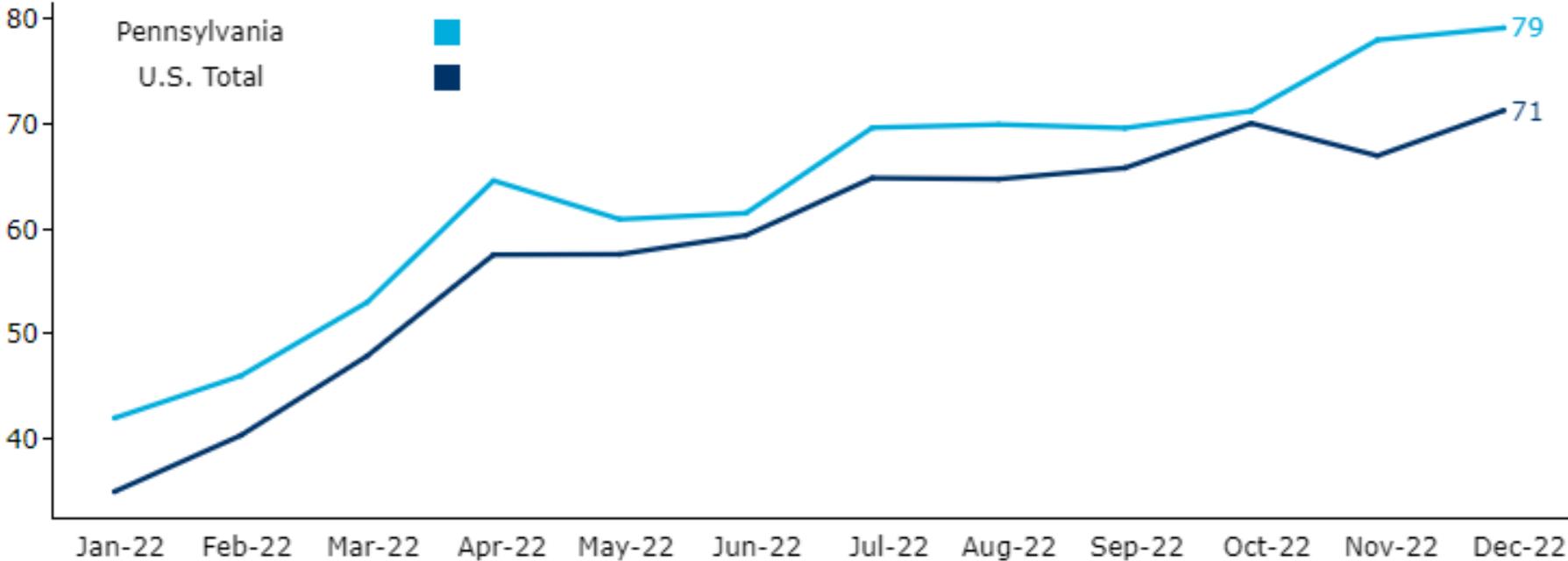


Source: Tourism Economics

# PA overseas travel recovering faster than the national average

## Overseas Arrivals

Visitor arrivals to US and Pennsylvania, % recovered vs 2019 (index, 2019=100)

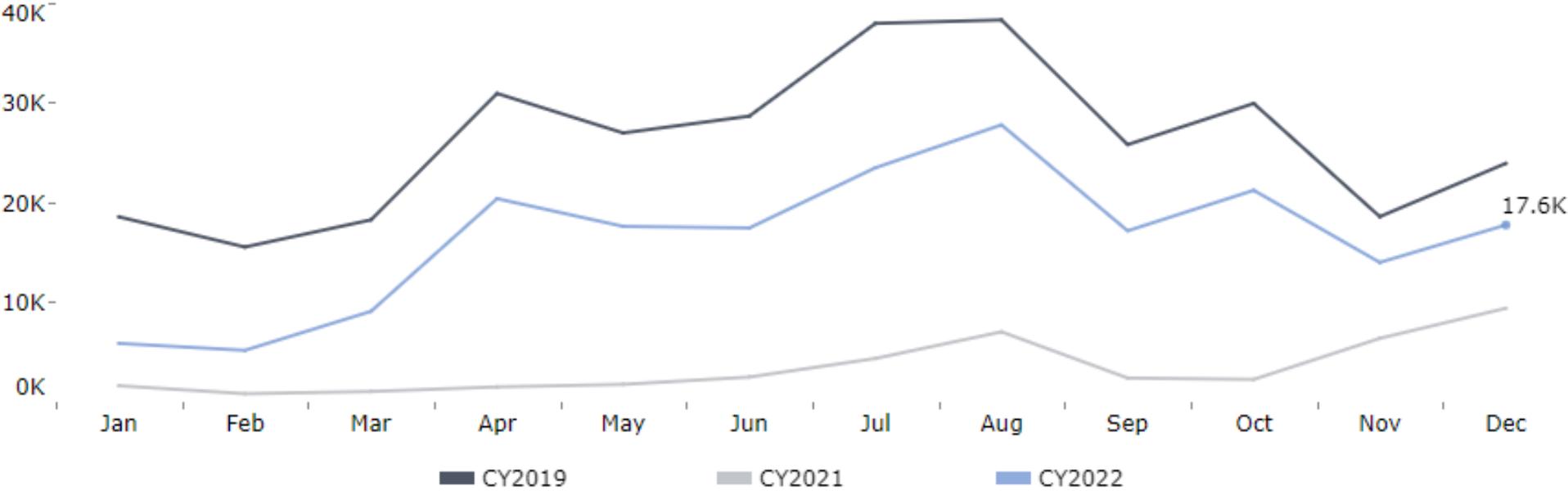


Source: NTTO (based on port of entry location)

# And seasonality is back!

## International Arrivals to Philadelphia

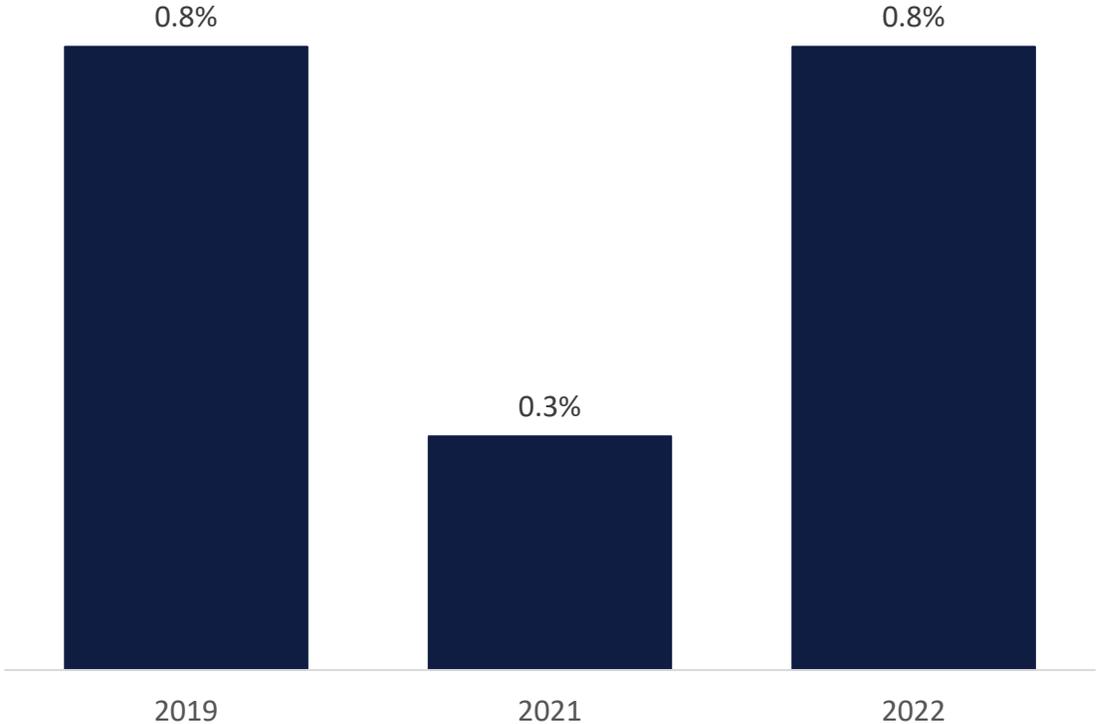
Visitor arrivals to Philadelphia



Source: NTTO (based on port of entry location)

# Philadelphia gained its market share back

Market Share of Overseas Arrivals to the US  
Philadelphia region



Source: NTT (based on first intended address only)

Western Europe gained market share of visits to Philadelphia (43% in 2022 vs 38% in 2019) while Asia went from 35% in 2019 to 23% in 2022.

# 1/4 of all overseas visits to Philadelphia was from the UK in 2022

## 2022 Top Origin Markets

Philadelphia region, total visits and % change vs 2019

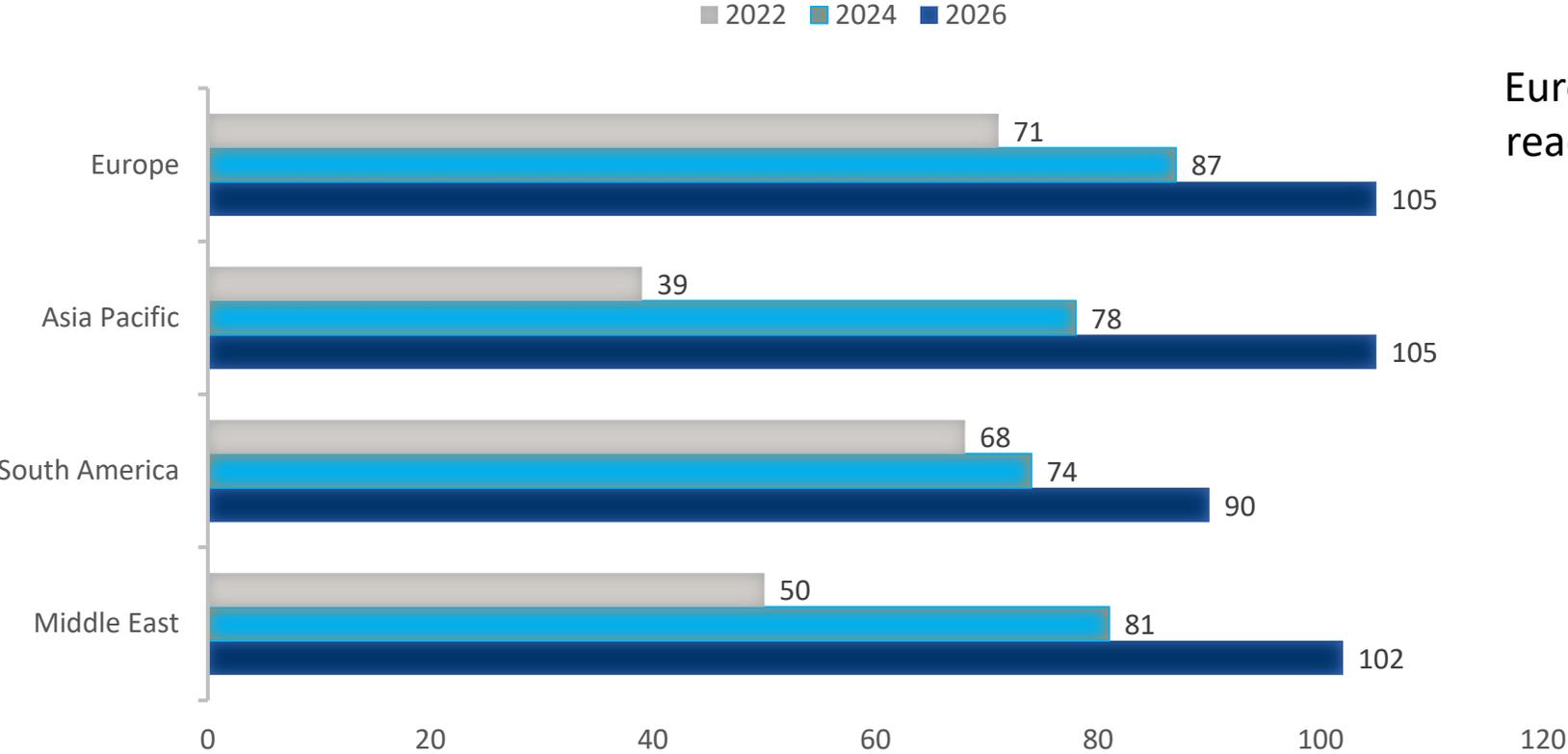
United Kingdom	98.2K	▼15.3%
Germany	41.9K	▼25.0%
India	40.1K	▼29.7%
Ireland	28.6K	▲43.0%
Netherlands	17.9K	▲10.7%
France	16.5K	▼48.0%
Korea, Republic Of	12.4K	▼48.8%
Italy	12.2K	▼45.7%
Australia	9.8K	▼30.6%
Spain	8.9K	▼49.6%

Source: Tourism Economics

# Europe to lead the charge for overseas travel recovery

## OVERSEAS TRAVEL TO THE PHILADELPHIA REGION FROM KEY MARKETS

TOP SOURCE MARKETS BY WORLD REGION, % RECOVERED TO 2019 (INDEX, 2019=100)

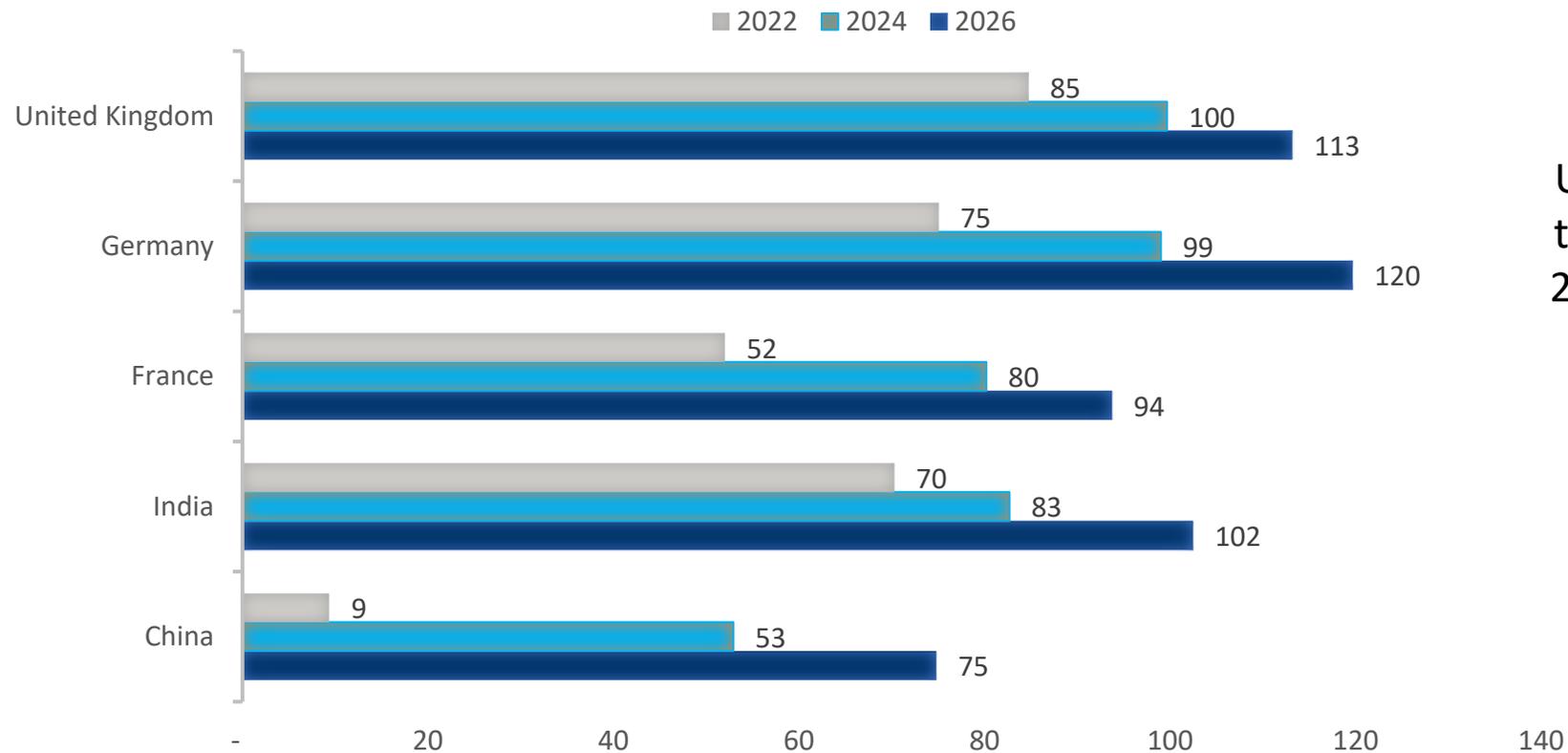


Europe will lead the recovery – reaching 87% of 2019 levels by 2024

Source: Tourism Economics (forecast released in December 2022)

# Western Europe to recover first of the key source markets

**OVERSEAS TRAVEL TO THE PHILADELPHIA FROM KEY MARKETS**  
TOP-5 MARKETS PRE-PANDEMIC, % RECOVERED TO 2019 (INDEX, 2019=100)



UK is expected to be the first of the Top 5 Markets to recover to 2019 levels – fully recovering by 2024

Source: Tourism Economics (forecast released in December 2022)

# International visits to reach 1M by 2024

## International Visits to Philadelphia

Forecasted visits by origin market, in thousands

	2019	2020	2021	2022	2023	2024	2025	2026
Canada	553.0	112.0	60.5	349.8	445.3	554.9	629.0	650.3
Mexico	25.6	8.8	14.3	18.3	20.3	24.6	26.6	27.2
Overseas	707.4	134.0	138.1	417.1	442.0	571.9	662.7	713.2
Grand Total	1,286.0	254.8	212.8	785.2	907.5	1,151.4	1,318.3	1,390.7

In 2019, overseas visitors represented **55%** of inbound visits to Philadelphia and **3/4** of total spend.

## International Visits to Philadelphia

Forecasted market share of visits and spending by origin

		2019	2020	2021	2022	2023	2024	2025	2026
Visits	Canada	43%	44%	28%	45%	49%	48%	48%	47%
	Mexico	2%	3%	7%	2%	2%	2%	2%	2%
	Overseas	55%	53%	65%	53%	49%	50%	50%	51%
Spending	Canada	27%	35%	18%	32%	33%	32%	31%	31%
	Mexico	1%	2%	2%	1%	1%	1%	1%	1%
	Overseas	72%	64%	80%	67%	66%	67%	68%	68%

Note: 2019-2021 actuals; 2022-2026 forecast

Source: Tourism Economics

# International spend will recover a year sooner than visitation

## International Spending to Philadelphia

Forecasted spending by origin market, in millions

	2019	2020	2021	2022	2023	2024	2025	2026
Canada	\$222.4	\$49.6	\$21.8	\$151.9	\$219.6	\$263.2	\$302.9	\$317.4
Mexico	\$6.5	\$2.3	\$3.0	\$5.1	\$6.8	\$7.9	\$8.5	\$8.8
Overseas	\$603.3	\$90.4	\$96.9	\$323.3	\$444.0	\$562.4	\$651.0	\$703.1
<b>Total International</b>	<b>\$832.1</b>	<b>\$142.3</b>	<b>\$121.7</b>	<b>\$480.2</b>	<b>\$670.4</b>	<b>\$833.5</b>	<b>\$962.5</b>	<b>\$1,029.3</b>

By 2024 total International spend will exceed \$833M, beating the \$832M spent in 2019

### Top-10 Overseas Markets (ranked by 2019 volume)

China	\$105.7	\$10.5	\$20.1	\$16.1	\$38.9	\$60.7	\$74.2	\$83.5
United Kingdom	\$88.7	\$15.2	\$8.3	\$63.7	\$84.8	\$98.8	\$108.9	\$109.9
India	\$59.3	\$9.8	\$11.9	\$40.1	\$51.2	\$62.7	\$71.7	\$80.4
Germany	\$47.2	\$5.4	\$4.6	\$31.7	\$41.2	\$52.1	\$58.5	\$61.0
France	\$23.3	\$3.3	\$2.7	\$15.0	\$21.0	\$26.6	\$29.1	\$29.7
Republic of Korea	\$21.3	\$3.8	\$6.8	\$16.4	\$15.6	\$21.1	\$26.7	\$31.1
Switzerland	\$20.0	\$2.4	\$1.9	\$11.3	\$16.3	\$20.4	\$23.7	\$26.5
Australia	\$17.8	\$3.1	\$1.0	\$11.6	\$17.0	\$22.5	\$25.7	\$26.5
Italy	\$16.4	\$2.4	\$2.2	\$10.0	\$14.7	\$17.0	\$18.3	\$18.9
Ireland	\$15.5	\$2.6	\$2.4	\$14.8	\$16.5	\$18.9	\$21.3	\$21.2

Note: 2019-2021 actuals; 2022-2026 forecast

Source: Tourism Economics

# International Room nights to fully recover by 2025

## International Room Nights to Philadelphia

Forecasted room nights in paid accommodations by origin market, in thousands

	2019	2020	2021	2022	2023	2024	2025	2026
Canada	1,630.5	328.1	177.1	1,059.7	1,365.2	1,688.2	1,897.3	1,963.1
Mexico	60.1	21.1	34.0	46.7	52.1	62.1	66.7	68.2
Overseas	1,546.1	280.4	263.0	896.9	1,023.2	1,299.8	1,482.8	1,591.5
<b>Total International</b>	<b>3,236.7</b>	<b>629.6</b>	<b>474.1</b>	<b>2,003.2</b>	<b>2,440.6</b>	<b>3,050.1</b>	<b>3,446.8</b>	<b>3,622.8</b>

Led by Canada's recovery, total International room nights will reach 2019 levels by 2025.

### Top-10 Overseas Markets (ranked by 2019 volume)

United Kingdom	268.9	49.2	32.7	214.7	232.4	275.1	301.9	306.9
India	242.6	47.1	48.8	164.6	175.5	214.4	239.9	263.4
China	205.0	28.6	12.6	15.9	51.6	89.2	110.1	123.9
Germany	139.5	17.1	16.3	94.8	103.7	132.9	149.6	157.6
France	74.1	10.9	7.9	46.0	55.1	71.7	79.7	83.1
Republic of Korea	47.1	9.0	5.6	24.8	29.1	42.3	53.5	61.6
Switzerland	39.5	5.2	4.2	22.3	27.2	34.8	40.3	44.8
Italy	39.1	6.1	5.6	24.5	30.3	36.2	39.3	41.1
Australia	36.7	6.7	2.8	25.6	31.7	40.6	45.4	46.5
Spain	33.4	6.7	5.9	13.7	15.0	17.6	18.8	20.1

Note: 2019-2021 actuals; 2022-2026 forecast

Source: Tourism Economics

# Summary

## 1 A mild recession is likely in 2023

Inflation and higher interest rates will leave a mark, but strong balance sheets should limit the downside

## 2 Travel is uniquely positioned for this downturn

- Households (and businesses) are in a fiscally strong position
- Pent-up demand is prioritizing travel
- Business travel continues to rebuild

## 3 Philadelphia outlook

- Demand will continue to reclaim ground in 2023
- International Visitors are expected to recover to 71% of 2019 levels in 2023 (908K)
- Top Overseas markets in 2023 are anticipated to be the UK, Germany, and India
- China is expected to be slowest to recover but will rank in top-5 for visits and spending in 2023



# SVETLANA YAZOVSKIKH

Vice President of Global Tourism





# SURVEY





# MELISSA MCCLURE

## Global Tourism Sales Manager



# Market Update: UK, Germany, & France

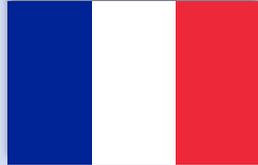
IN FOCUS FOR FISCAL YEAR 2023



**UK**



**GERMANY**



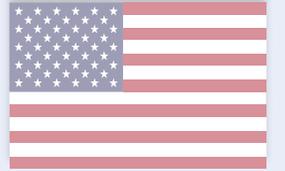
**FRANCE**



**INDIA**



**CHINA**



**DOMESTIC**

Group Tour

# Global: Media Arts FAM

Total Stories: 35 | UK, Germany, France, Italy, India

THE TIMES  
SCOTLAND

ARTOLOGY  
Magazine and Gallery

THE NEW  
INDIAN  
EXPRESS

vistara®  
Fly the new feeling

The screenshot shows the BeauxArts website interface. At the top, there is a navigation bar with the site name 'connaissance des arts' and options for 'Se connecter' and 'S'abonner'. Below the navigation, a featured banner for 'BeauxArts' includes a video conference announcement for 'JOHANNES VERMEER' on '20. 02. 23 à 18h30' with a 'Je réserve' button. Below this, a large article titled '48 heures à Philadelphie, capitale artistique de l'Est américain' is displayed, featuring a photograph of the Philadelphia Museum of Art. The article is by 'Maïlys Ceaux-Lanval' and dated 'le 23 octobre 2022'. The text of the article describes Philadelphia as a city with a rich artistic heritage, mentioning its museum, street art festival, and historical sites. The website also features a search bar and various menu items like 'Agenda', 'Vidéos', 'Expos', 'Insolite', 'À la loupe', 'Lifestyle', 'L'ENCYCLO', 'Conférences', 'Le Magazine', and 'La Boutique'.

ZEEZEST

Arts  
Magazine

la Repubblica

Journal  
Dimanche

# Europe: Social Media

## CAMPAIGN HIGHLIGHTS

### France Tik Tok Campaign:

- 1.8M impressions
- 550,000+ people reached
- 2,000+ clicks

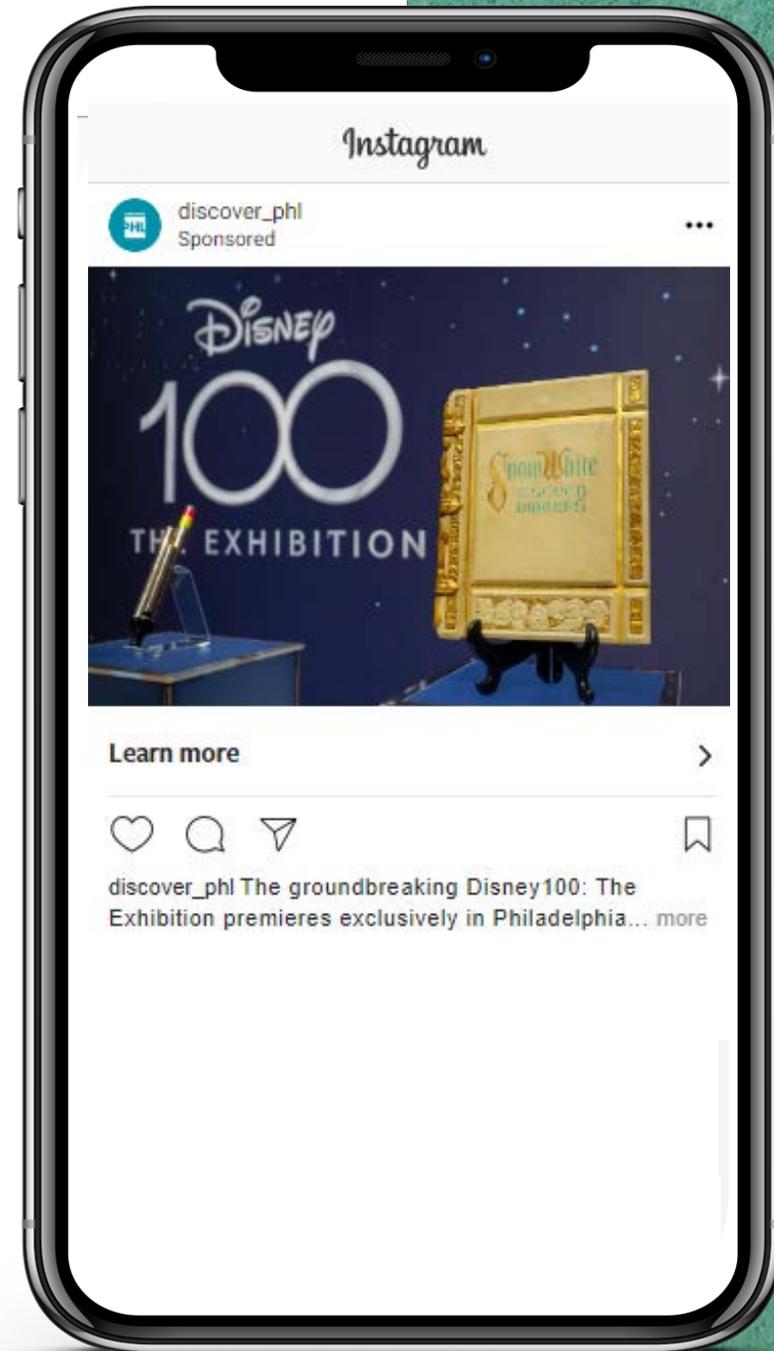


# Europe: Social Media

## CAMPAIGN HIGHLIGHTS

### UK Facebook & Instagram Campaign:

- 150,000 impressions
- 69,000 unique users
- 13,700 engagements



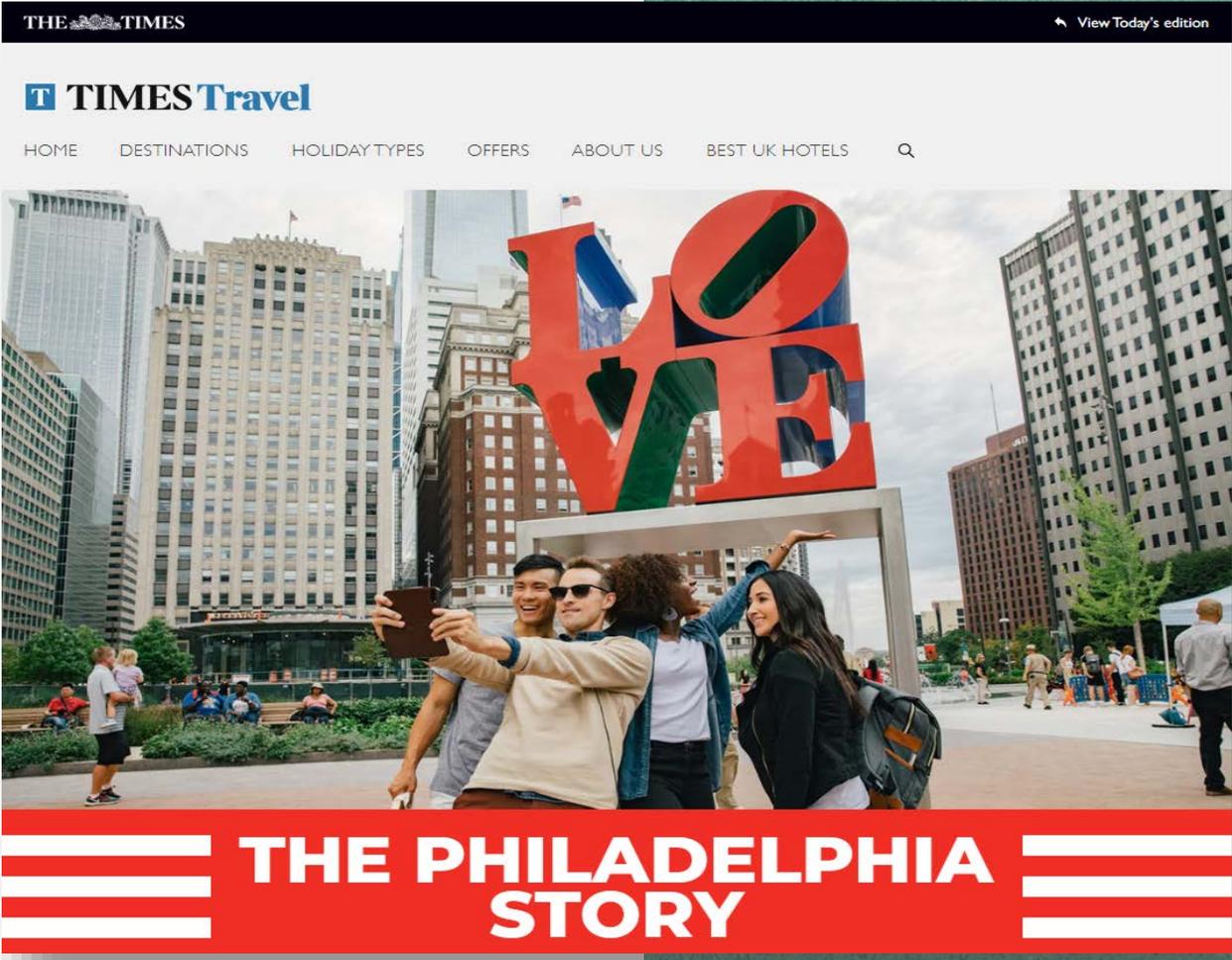
# Europe: Marketing

CAMPAIGN HIGHLIGHTS (JAN – MAY 2023)

- **12 Campaigns Planned:**

- UK
- Ireland
- France
- Germany
- Switzerland

- **Goal:** Driving Bookings into Philadelphia



The screenshot shows the Times Travel website with a navigation bar including 'HOME', 'DESTINATIONS', 'HOLIDAY TYPES', 'OFFERS', 'ABOUT US', and 'BEST UK HOTELS'. The main image depicts a group of people taking a selfie in front of the 'LOVE' sculpture in Philadelphia. A red banner at the bottom of the image reads 'THE PHILADELPHIA STORY'.

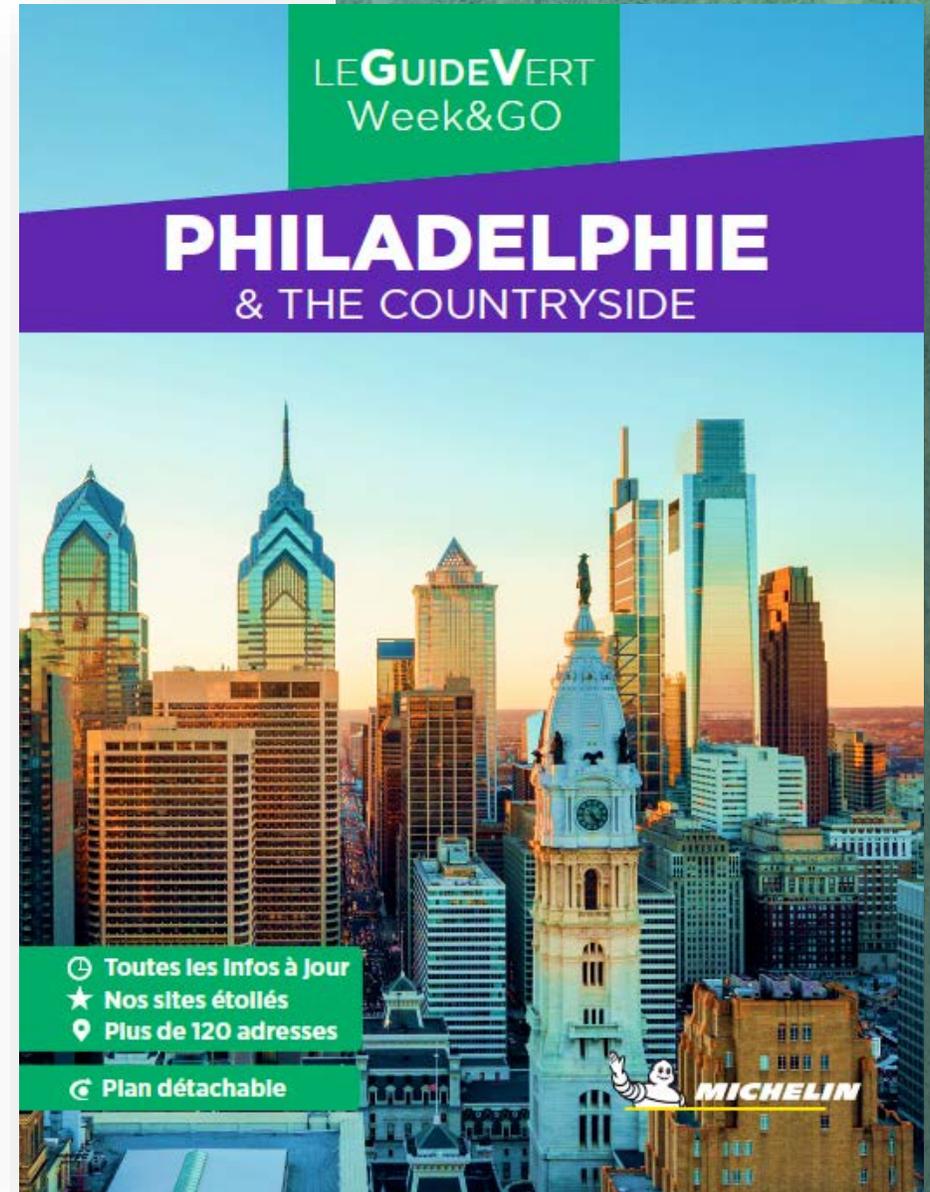
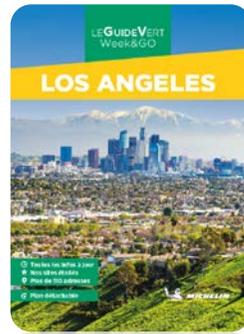
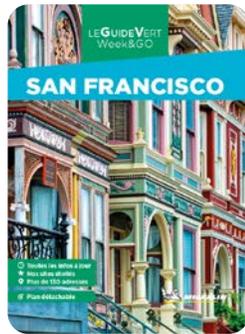
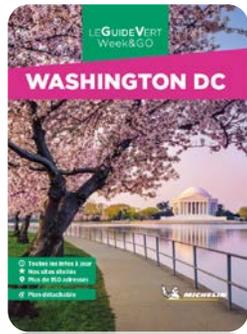
**Featured PHLCVB Partners:** Philadelphia Museum of Art, The Barnes Foundation, The Franklin Institute, Philadelphia's Magic Gardens, Mutter Museum, Eastern State Penitentiary, Reading Terminal Market, Laser Wolf, Royal Boucherie, Vetri Cucina, Sonesta Philadelphia Downtown, Wyndham Philadelphia Historic District, Hilton Philadelphia Penn's Landing, Philadelphia International Airport

# Europe: Driving Demand

THROUGH GLOBAL BRANDS

## » THE MICHELIN GUIDE (US Cities):

- New York City
- Washington, D.C.
- San Francisco
- Chicago
- Los Angeles
- Philadelphia\*



# Europe: Sales Events

HIGHLIGHTS: **JANUARY – MARCH 2023**



**ONE-TO-ONE  
BUSINESS MEETINGS:**  
U.K. & Europe



**UK + IRELAND  
SALES MISSION**

# Europe: FAM Tours

TOUR OPERATORS & MEDIA

## Global Receptive Tour Operator FAM

March 1 – 3, 2023

## UK Trade FAM

March 23 – 27, 2023

## France Trade FAM

April 16 – 20, 2023

## France Influencer FAM

June 2023

## Germany Trade FAM

June 2023





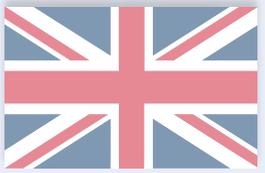
# MIRIAM CHOVANEC

## Senior Global Tourism Sales Manager

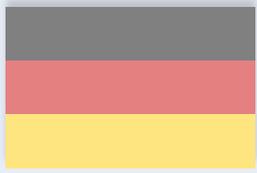


# Market Update: India

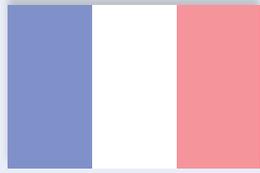
IN FOCUS FOR FISCAL YEAR 2023



UK



GERMANY



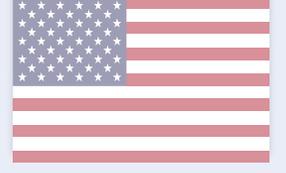
FRANCE



INDIA



CHINA



DOMESTIC

Group Tour

# India: Destination Training

NEW DELHI – DECEMBER 2, 2022



# India: Sales Events

MARCH 2023



**Brand USA India Sales Mission**



**INDIA  
SALES MISSION  
EXTENSION**

# India: Marketing Campaigns

CAMPAIGN HIGHLIGHTS (JAN – JUNE 2023)

## Brand USA Multichannel

Inspirational Destination Content

March – May 2023

## Consumer Inspiration

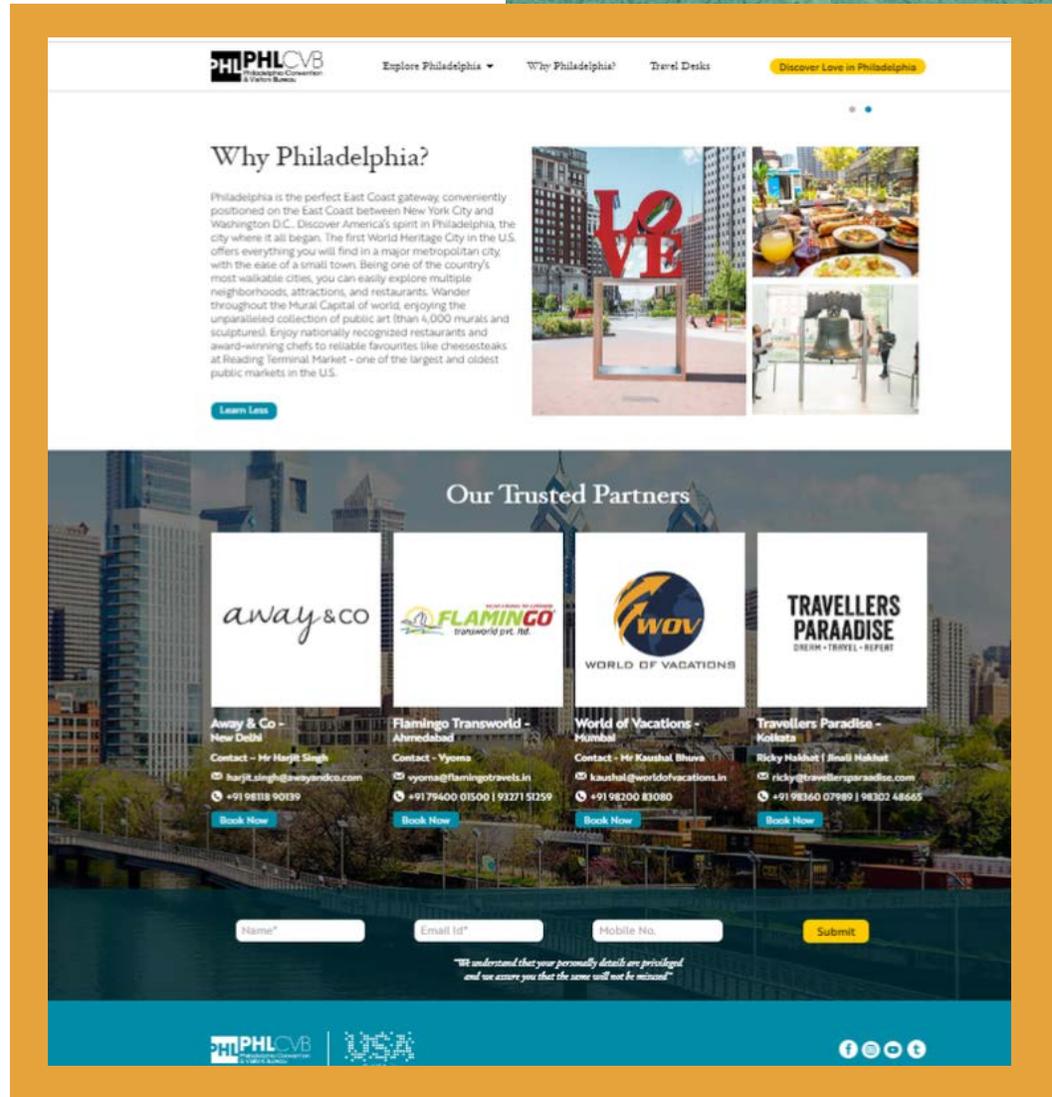
Trip Planning Call-to-Action

March – May 2023

## Tactical Booking Co-Op

Booking Trip Call-To-Action

April – May 2023

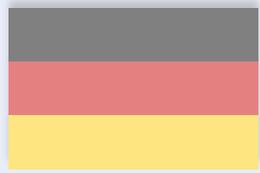


# Market Update: China

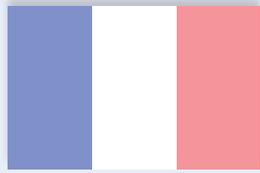
IN FOCUS FOR FISCAL YEAR 2023



UK



GERMANY



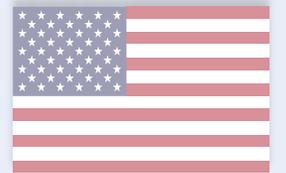
FRANCE



INDIA



CHINA



DOMESTIC

Group Tour

# China: Restart of Travel

DEMAND FOR INFORMATION



## VISIT REQUIREMENTS

What to expect from a visit



## HEALTH & SAFETY

Policies in place to safeguard visitors



## NEW DEVELOPMENTS

What's new with you?



# China: Top Receptive Tour Operators

REENGAGE WITH THE MARKET



Ctrip / Trip.Com



Jupiter Legend



America Tours International





# ANNIE JIRAPATNAKUL

## Global Tourism Sales & Services Manager

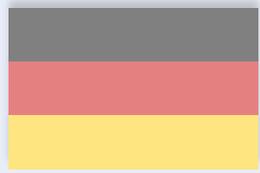


# Market Update: Domestic Group Tour

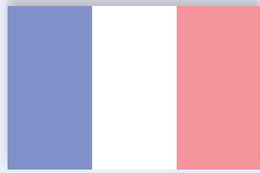
IN FOCUS FOR FISCAL YEAR 2023



UK



GERMANY



FRANCE



INDIA



CHINA



**DOMESTIC**

Group Tour

# National Tour Association (NTA) Travel Exchange

## Dates:

November 13 – 16, 2022

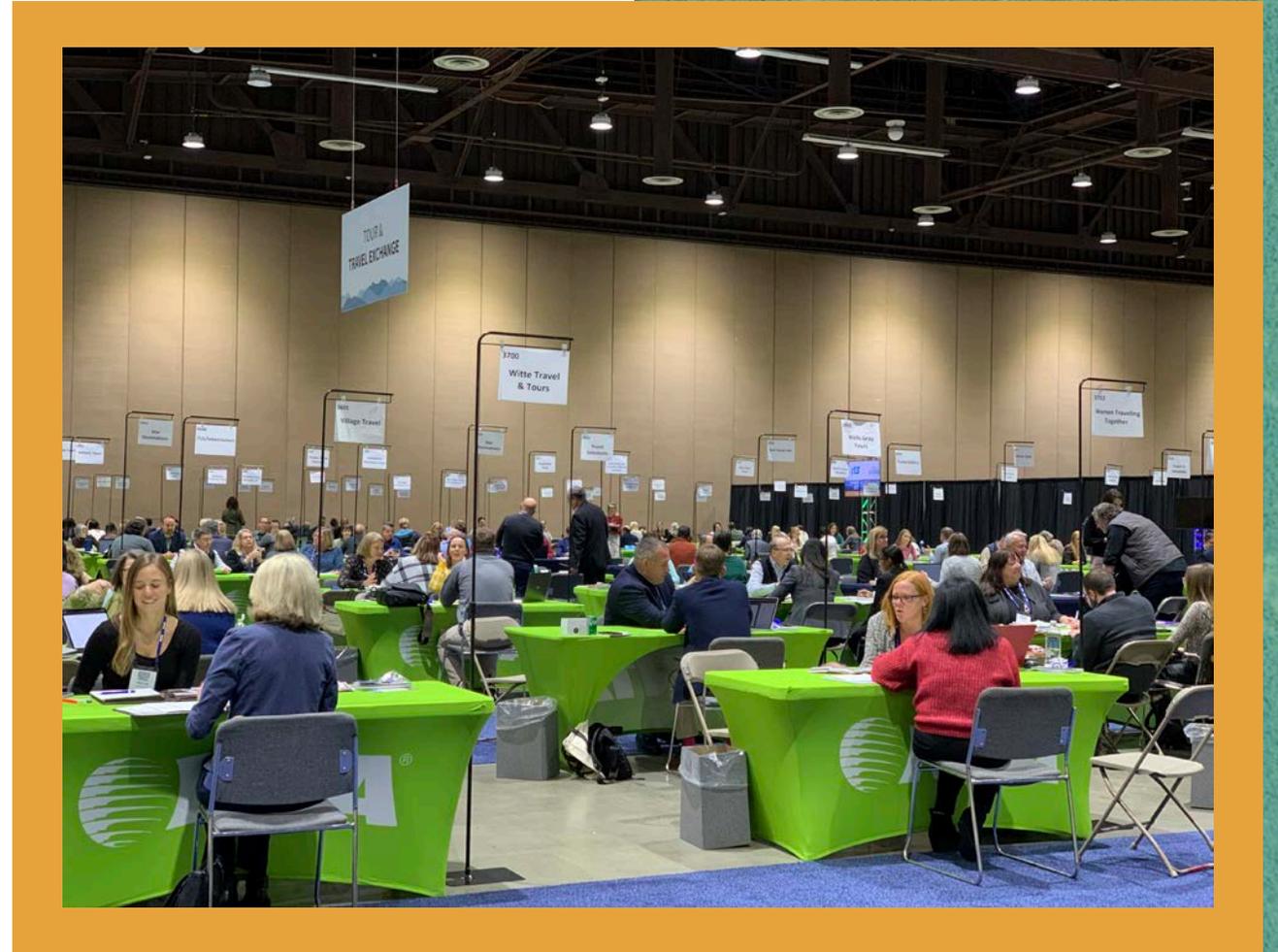
## Partners:

- Faith and Liberty Discovery Center

## Appointments: 29

### • Top FAQs:

1. Step-on Guides
2. Group-friendly Hotels
3. Group-friendly Restaurants
4. Evening Activities
5. Performance Venue Options



# American Bus Association Annual Marketplace

**Dates:** February 4 – 7, 2023

## **PHLCVB Partners:**

1. The Barnes Foundation
2. Eastern State Penitentiary
3. Faith and Liberty Discovery Center
4. Fashion District Philadelphia
5. Historic Philadelphia, Inc.
6. Holiday Inn Express Philadelphia Midtown
7. Museum of the American Revolution
8. National Constitution Center
9. Penn Museum
10. Philadelphia Flower Show



# American Bus Association Annual Marketplace

2025: PHILADELPHIA IS THE HOST CITY



# Domestic Group Tour: Sales Events

FEBRUARY – JUNE 2023



**TAP** INTO TRAVEL



**PHLCVB**  
Philadelphia Convention  
& Visitors Bureau

**CANADA  
SALES MISSION**

# Domestic Group Tour: Marketing

FISCAL 2023

## Publications:

- Group Tour Magazine
- Youth Travel Planner Magazine
- Group Travel Leader
- Teach & Travel Magazine
- Leisure Group Travel

## Dates:

Summer 2022 – Spring 2023



**CUSTOM CONTENT**

### Make haste to Philadelphia then take time to take it all in

BY VICKIE MITCHELL

Ben Franklin reminded us "haste makes waste." So he'd be dismayed when tour groups blow through Philadelphia on their way to Washington or New York.

Franklin lived in Philadelphia most of his long life, and if he returned today, he'd agree with Annie Jirapatnakul of the Philadelphia CVB.

"We are," she says, "more than a day trip."

#### A World Heritage City

The nation's birthplace, Philadelphia was the first in the U.S. to be named a World Heritage City. Its historic district, often called America's "most historic square mile," is "walkable with low-cost and free attractions and nearby hotels at all price points," says Jirapatnakul. But even though it is compact, tours should schedule at least a day and a half to absorb it all, she says. Good ways to start are a walking tour or a trip aboard one of the city's double-decker buses.

A number of the historic district's sites are tied to Franklin, including Independence Hall, a UNESCO World Heritage Site, where the Declaration of Independence

and the Constitution were hammered out; the Benjamin Franklin Museum, which explores Franklin's curiosity, inventiveness and other personality traits; and Christ Church Burial Ground, where visitors toss pennies toward Franklin's grave, a nod to his financial advice that "a penny saved is a penny earned."

The Museum of the American Revolution, a newer addition to the district, focuses on how everyday colonists took up the revolutionary cause. In 2023, a special exhibit will examine the impact of a Black Philadelphia family, the Fortens, on the revolution and abolition. Other stops include the Liberty Bell, the Betsy Ross House and the National Liberty Museum, as well as a new and decidedly different Museum of Illusions.

#### Philly Favorites

Along the way, groups can enjoy dining spots like Campo's, which has been serving Philly cheesesteaks and hoagies since 1947. The restaurant is small but has a knack for making tasty box lunches and delivering them to places where groups can gather to dine, such as the welcoming, Old Pine Community Center. For a stop to please diverse tastes, Reading Terminal Market offers a world of foods. Voted the best public market in the nation in 2022 by USA Today 10Best, the Market offers Cajun, Caribbean, Chinese, cheesesteak, pasta, Pennsylvania Dutch, seafood, sushi and even Georgian.

While Philadelphia is without a doubt a hotbed of American history, as Jirapatnakul reminds, it is also packed with art, music, Broadway shows, murals, museums and sporting events. New exhibitions at two institutions are likely to draw groups in 2023 — the new Mediterranean gallery at the Penn Museum and the world premiere of Disney100: The Exhibition at The Franklin Institute.

"With so much new development, we are more than we used to be," said Jirapatnakul.

Ben Franklin would agree.

[discoverphi.com/group-tour](https://discoverphi.com/group-tour)

FOR MORE INFORMATION, CONTACT:  
ANNIE JIRAPATNAKUL  
GLOBAL TOURISM SALES & SERVICES MANAGER  
PHILADELPHIA CVB  
215-636-3405 (O)  
484-995-7457 (C)  
ANNIE@DISCOVERPHL.COM

**PHLCVB**  
Philadelphia Convention & Visitors Bureau

## Discover PHILADELPHIA

### A Departure FROM THE ORDINARY TOUR

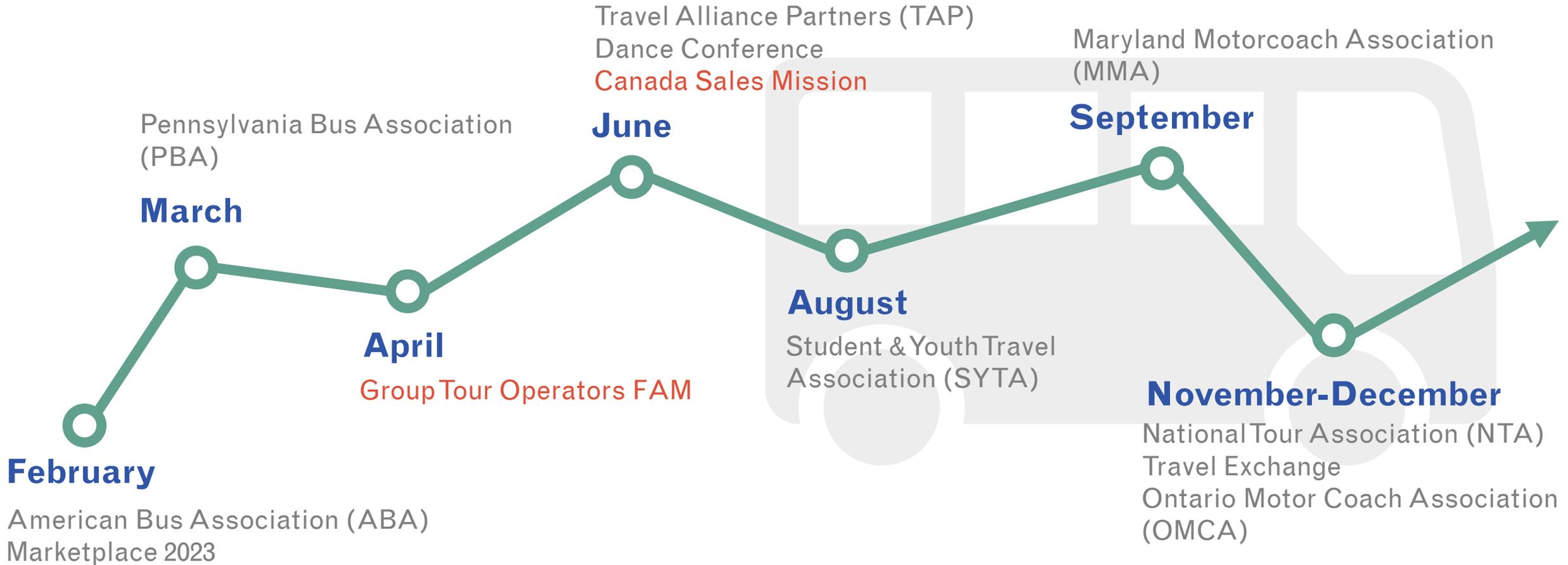
LEARN MORE AT [DISCOVERPHL.COM/GROUP-TOUR](https://DISCOVERPHL.COM/GROUP-TOUR)

**PHLCVB**  
Philadelphia Convention & Visitors Bureau

WE WELCOME YOU WITH OPEN ARMS

# Domestic Group Tour Highlights

CALENDAR YEAR 2023



# QUESTIONS



**THANK** *You!*

**PHLCVB**  
Philadelphia Convention  
& Visitors Bureau